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ABSTRACT

This volume of a catalog developed by the Toledo, Ohio, Public School System under the Model for Quality Education Project was designed as a resource for needs assessment and evaluation of school programs and procedures. Part one presents an overview of major school administrative areas, including staff personnel, curriculum and instruction, business and finance, pupil personnel, facilities, school community relations and policy. Part two addresses the key evaluation concerns and procedures for review or revision of each administrative area, and includes a list of references providing additional evaluation criteria and measures. Part three is an alphabetical index to issues covered in the catalog. (JCD)

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ED211617

TOLEDO CATALOG, VOLUME 2

SCHOOL ADMINISTRATION

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THE TOLEDO CATALOG:

ASSESSMENT OF STUDENTS AND SCHOOL ADMINISTRATION

draft

JUNE 30, 1980

VOLUME 2

school administration

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TABLE OF CONTENTS

PREFACE i

INTRODUCTION 1-4

PART I OVERVIEW 5-11

PART II KEY EVALUATION CONCERNS 12-158

STAFF PERSONNEL 13-30

CURRICULUM AND INSTRUCTION 31-63

BUSINESS AND FINANCE 64-95

PUPIL PERSONNEL 96-135

FACILITIES 136-143

SCHOOL - COMMUNITY RELATIONS 144-153

POLICY 154-158

PART III INDEX 159-169

PREFACE

This document and its companion document are products which were developed jointly by the Toledo Public School System and the Evaluation Center at Western Michigan University. The development of the products took place during Phase II of the Model for Quality Education Project implemented by the Toledo Public School System. The documents have been produced by a large number of people associated both with the Toledo Public Schools and the Evaluation Center, as well as resource persons from other institutions. This is the second draft of a developing resource.

The general principle guiding the development of the catalog was that evaluation systems for schools should be based on those characteristics which the school district is interested in developing in students and the tasks which administrators must perform to facilitate student development. Consequently, the catalog concentrates on characteristics of students and the administration of the schools which are pervasive in nature and which affect all levels of the school district. These characteristics serve as the major organizers for the documents. The purpose of the documents, however, is to show that a variety of assessment considerations and measuring procedures can be used when collecting information concerning students and school administration.

The organization of each volume of the catalog is slightly different, depending upon whether the contents of the volume concern student or administrative characteristics. The specification of the organization is detailed in the Introduction of each volume.

INTRODUCTION

Volume II of the Toledo Catalog contains a listing of administrative functions in a school district along with information that might be of interest in evaluating those functions. The general administrative areas included are:

STAFF PERSONNEL

CURRICULUM AND INSTRUCTION

BUSINESS AND FINANCE

PUPIL PERSONNEL

FACILITIES

SCHOOL - COMMUNITY RELATIONS

POLICY

Part I, Overview

Each of these major administrative areas has been broken down into logical topics. POLICY, for instance, includes sections on Content, Adoption, Implementation, and Review and Revision. The Overview in Part I contains a complete listing of the topics included in each administrative area.

Part II, Key Evaluation Concerns and Assessment Information

Throughout the volume, information has been organized to answer key evaluation concerns. Every topic listed in the Overview is presented in Part II in light of major evaluation concerns. One topic under POLICY, for instance, is Policy Review and Revision. The Key Evaluation Concern is "How effective is the review and revision process in involving appropriate persons in regular reviews of school policy?"

Each key evaluation concern throughout the volume is followed by a listing of assessment information--that is, information that might be considered when investigating the key evaluation concern. Assessment considerations include examples that elaborate on the type of information one might consider or gather. The following is an example of an assessment information entry from Policy Review and Revision:

effectiveness of review and revision process
e.g. number of appeals/grievances/court cases relating to policy
number of times policy is thoroughly reviewed
perceived credibility of review/revision process
percentage of recommended revisions actually made
percentage of revised policies
trends in revisions (parenting philosophy, legislation, educational trends)
personnel/community members involved/not involved
impact of revised policy (brings improved services)

Each major administrative area presented concludes with a Reference section. This section lists selected references that contain additional evaluation criteria, assessment considerations, or measurement instruments and procedures. These references, by no means exhaustive, generally have been included if they provide additional evaluation information that is efficiently organized, practical, and up-to-date.

Part III, Index

The final section, Part III, in the volume is an index. The Index is an alphabetical listing of the administrative topics found in Part I, Overview. This index allows a user to enter the volume through a specific topic and to check the page numbers for cross-indexed entries.

Uses

This volume of the Toledo Catalog is proposed as a resource for needs assessment and evaluation of school programs and procedures. It is intended to provide a more complex view of the administration of a school

district than can be obtained using any single set of criteria presently available, or by using student achievement as the sole guide to judgments concerning administration.

There are a number of caveats regarding the use of this volume. Most importantly, Volume II of the Toledo Catalog is still in a developmental stage. The volume has not yet been field tested; information based upon its application will be important to further refine and expand its contents. Secondly, Volume II is dependent upon an administrator's evaluation purpose. In an effort to narrow the hundreds of evaluation questions that might be asked, each administrative topic has been focused by a Key Evaluation Concern. Users of Volume II must assess whether that concern parallels their own, and then, if necessary, make appropriate adjustments. And, finally, the assessment information listed in Volume II is not exhaustive. The intent has been to give users a more inclusive list of evaluative criteria for school district administration than presently exists. To do so, the level of detail for each particular evaluation concern has been carefully focused. It is for this reason that references have been added for those users who wish additional detail for evaluating any one area.

Based upon these concerns, it is recommended that Volume II be used as a developing resource. It has been designed to allow for quick reference by busy school personnel who have little time to read lengthy, descriptive manuals. To make it more useful, users might add or delete criteria as experience dictates; note in the margins when they have documentation or instruments for selected criteria; add evaluation questions as they deal with actual issues; and add references, noting those which are particularly helpful. Such efforts will help make

Volume II a more useful handbook, and will help in later revisions to tailor the document to the needs of the Toledo Public Schools.

Although Volume II of the Toledo Catalog has been developed with administrators' needs in mind, it can be used by anyone who has administrative responsibilities or is interested in assessing administrative procedures. Moreover, it can be used for a number of purposes. For instance, it can profitably be used to plan as well as to evaluate, to negotiate job responsibilities, and to orient an audience to the scope of responsibilities in a school district. Together with its companion volume, The Toledo Catalog: Assessment of Students and School Administration should provide a useful resource for those who must continually evaluate student progress and administrative effectiveness.

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PART I

OVERVIEW

STAFF PERSONNEL

Appraisal

Performance Appraisal
Transfer, Promotion, Dismissal

Bargaining

Preparation for Bargaining
Contract Negotiation
Contract Administration

Compensation

Leaves of Absence
Working Conditions, Safety, and Non-economic Benefits
Salaries, Wages, and Benefits

Security

Tenure
Academic Freedom
Grievance Procedures

Employment

Influences
Staffing Needs
Recruitment and Screening
Personnel Selection
Orientation of Personnel

References

CURRICULUM AND INSTRUCTION

Pervasive Program Concerns

Mission
Goals
Objectives
Influences
Target Group(s)
Personnel
Materials
Environment
Curriculum Design
Courses Within Curriculum
Scheduling
Articulation
Balance
Continuity
Scope and Sequence
Instructional Conditions
Instructional Methods
Change and Innovation
Staff Development

References

BUSINESS AND FINANCE

Accounting for Resources

Internal Auditing
External Auditing
Inventory Control

Budget Management

Budget Preparation
Long-Range Budget Projections
Preparation of Appropriations
Public Budget Review

Resource Acquisitions

Federal Funds
Special State Funds
Financial Projection of Millage for Levy or Bond Purposes
Investment of Funds
Private Source Money
School Foundation Programs

Purchasing, Allocating, and Disbursement

Safety Inspections
Quality Control
Allocation System for Supplies and Materials
Developing, Receiving, Awarding Bids

Non-Instructional Support

Security Program
Food Services
Mail Service
Transportation
School Fire and Disaster Planning
Clerical-Secretarial Service

References

PUPIL PERSONNEL

Pupil Accounting and Census

Pupil Accounting Services
Pupil Census

Health Services

Health Care Services Delivery
Target Group
Health Care Program Support

Guidance and Counseling

General Aims
Influences
Historical Analysis
Target Group
Facilities
Materials
Budget Allocation
Pupil Appraisal
Class Scheduling
Counseling Individual Students
Referrals
Assisting Staff (Consulting)
Career Development

Psychological and Testing Services

Testing Program
Psychological Services

Discipline and Control

Disciplinary Climate
Vandalism

Special Education

Due Process
Individualized Education Program
Program Delivery
Monitoring and Follow-Up

Welfare/Social Services

Referral and Liaison Activities

References

FACILITIES

Plant Considerations

Maintenance and Repair of Plant and Equipment
Capital Improvements - Renovation
Custodial Service

Property Concern

Sale, Lease, Purchase of Equipment
Sale, Lease, Purchase of Land and Structures

References

SCHOOL - COMMUNITY RELATIONS

District Information

Students
School Personnel
School-Community Councils

Character of Community

Power Structure
Ethnic Groups
Level of Support
Parent-Teacher Association
Historical Analysis

Media

Use of Media

References

POLICY

Pervasive Program Concerns

Content of Policy
Policy Adoption
Policy Review and Revision
Implementation

PART II

KEY EVALUATION CONCERNS

Appraisal

Performance Appraisal

Key Evaluation Concern: To what extent is the performance appraisal system equitable, methodologically sound, and efficiently implemented?

purposes
- e.g. selection
  - position compatibility
  - counseling
  - salary determination
  - tenure
  - performance improvement
  - promotion, transfer, dismissal

methods
- e.g. self-appraisal
  - external review
  - internal review

adequacy of appraisal methods
- e.g. relevance of collected information to job duties (validity)
  - reliability within and across methods and appraisers
  - cost efficiency
  - timeliness
  - frequency of appraisal
  - defensibility
  - compliance with tenure and employment legislation

adequacy of performance standards
- e.g. explicitness of position and person specifications
  - performance components and expectations defined
  - extent of staff awareness of expectations
  - extent of staff involvement in standard setting

impact
- e.g. overall system performance
  - staff and individual morale/productivity
  - labor organization relations

Appraisal

Transfer, Promotion, Dismissal

Key Evaluation Concern: Is the system of transfers, promotions, and dismissals equitable, efficiently implemented, and effective in maintaining and improving system quality?

scope of policy
- e.g. personnel responsible for carrying out policy identified
  protocol for filling vancancies detailed
  extent of internal and external promotion permissible
  means and basis for idnetifying promotable, transferable, dismissable personnel

adequacy of policy
- e.g. staff awareness of policy
  clarity of intent and meaning
  board and staff commitment to policy
  labor organization commitment to policy

scope of procedures used
- e.g. performance appraisal (see Performance Appraisal)
  competitive exams
  seniority/tenure
  planned job rotation
  internship/assistantship

adequacy of procedures
- e.g. uniformity of application/equitableness
  timeliness of procedures
  efficiency of administration
  defensibility
  reliability and validity of procedures
  staff awareness and understanding of procedures
  evidence to support action
  employee assistance and remediation

effectiveness
- e.g. overall system quality
  staff support
  effect on staff stability within and across schools
  balance of experienced/inexperienced teachers in "desirable" and "undesirable" schools
  effect on staff morale/productivity
  labor organization relations

Bargaining

Preparation for Bargaining

Key Evaluation Concern: Does the existing agreement allow for effective system operation and does it meet the needs and goals of administration and staff?

review of existing contract
- e.g. clauses which need modification
  evidence available to indicate violation of agreement
  evidence available to support achievement of contract goals
  difficulties in contract administration

review of grievances and grievance resolution
- e.g. total number
  causes of grievances
  resolution mechanisms used
  nature of settlements
  relationship of grievances to weaknesses in contract

other review
- e.g. union or association proposals
  comparison of employee compensation
  negotiating team composition
  negotiating team strategies

Contract Negotiation

Key Evaluation Concern: Are contract negotiations completed in a timely manner and reflective of both parties' goals and rights?

adequacy of negotiating team attributes
- e.g. understanding of system operation and resources
  knowledge of applicable legal structure
  understanding of personnel needs
  knowledge of personnel policies, procedures, and trends

negotiation effectiveness
- e.g. timeliness in reaching ratification
  level of animosity
  retention of administrative rights and responsibilities
  extent of maximization of staff opportunities and goals
  congruence of final agreement with goals of both parties
  school-community relations (see SCHOOL - COMMUNITY RELATIONS)

scope of agreement
- e.g. security and rights of staff
  security and rights of school system
  compensation and working conditions
  employment security
  administration of agreement

Bargaining

Contract Administration

Key Evaluation Concern: Do contract administration procedures provide for efficient and fair system operation and behavior in accordance with contract provisions?

scope of contract administration activities
- e.g. interpretation of contract provision to staff and line administration
  - recording action regarding contract provisions
  - conducting meetings between union and administration
  - (see Grievance Procedures)

adequacy of activities
- e.g. frequency of administration/union meetings
  - comprehensiveness of records involving contract administration
  - clarity of administration procedures
  - equitableness of administration procedures
  - level of awareness and understanding of contract administration by staff and administration
  - (see Grievance Procedures)

adequacy of administration
- e.g. number and types of disputes
  - types of decisions rendered
  - timeliness of resolutions

contract impact
- e.g. staff security and rights
  - compensation and working conditions
  - personnel motivation/morale
  - rapport/cohesion between staff and administration
  - school-community relations
  - labor organization relations

Compensation

Leaves of Absence

Key Evaluation Concern: Are leaves of absence granted for legitimate reasons and in an efficient and equitable manner?

nature and scope of leave requests
- e.g. personal illness
  - extended personal illness
  - death in family
  - maternity
  - sabbatical
  - professional meetings/exchange teaching
  - military
  - religious holidays
  - extended leave to continue education
  - civic obligations (e.g., jury duty)

suitability of existing administrative controls
- e.g. time limitation for non-illness leaves specified
  - acceptable conditions for leave specified (see eligibility requirements below)
  - standardized application procedures
  - staff awareness
  - provision for cooperative leave planning
  - provision for review and revision of policy
  - leave verification procedures

eligibility requirement conditions specified
- e.g. service required on return
  - assignment on return
  - salary on return
  - termination of leave
  - notice of intention to return

priorities
- e.g. mandated (legislated) priorities
  - non-mandatory budgetary priorities
  - safeguarding of educational delivery quality

effectiveness
- e.g. frequency of leave request by type
  - privileges subject to abuse
  - staff morale and productivity
  - staff health
  - staff professional skills

Compensation

Working Conditions, Safety, and Non-economic Benefits

Key Evaluation Concern: Does the district insure a safe, comfortable, and properly equipped workplace for its employees?

policy
- e.g. assigned enforcement responsibility
  compliance of policy and procedures with relevant laws
  adequacy of fiscal support
  extent of board commitment
  conscious elimination of safety hazards
  provision for staff safety training
  provision for adequate student discipline and control
  (see PUPIL PERSONNEL, Discipline and Control)

safety inspection and investigation
- e.g. frequency of safety inspection
  agencies involved (OSHA, Fire Department)
  adequacy of follow-up
  staff awareness of reporting procedures

adequacy of sonic environment
- e.g. effectiveness of sound insulation of individual rooms
  effectiveness of sound reduction from external sources
  proper accoustical balance
  effectiveness of reduction or elimination of unwanted sound propagation

adequacy of visual environment
- e.g. brightness balance throughout physical plant
  use of natural lighting
  energy conservation measures taken
  relationship of room lighting type to room use

adequacy of thermal environment
- e.g. temperature constancy yearlong/within building
  proper air circulation/fresh air intake
  provision for appropriate exhaust ventilation
  efficiency of temperature controls

adequacy of physical facilities and equipment
- e.g. sufficient instructional and workspace
  proper equipment supplied/available
  equipment in proper working condition
  equitable distribution of needed supplies and equipment

Compensation

Working Conditions, Safety, and Non-economic Benefits

adequacy of psychological environment
- e.g. decentralized decision-making
  - decentralized responsibility for action and behavior
  - position security
  - leadership style
  - commitment of staff to organizational goals
  - sufficient student discipline/control procedures

(see CURRICULUM AND INSTRUCTION, Environment)

impact on staff
- e.g. security
  - self-esteem/confidence
  - self-understanding
  - personal satisfaction/integrity
  - health/safety
  - morale/productivity

Compensation

Salaries, Wages, and Benefits

Key Evaluation Concern: Are prevailing wages, salaries, and benefits internally consistent and externally competitive?

compensation structure
- e.g. inclusive of all positions in system
  function and distinguishing features of position identified
  relationship to other positions and position cluster identified
  relative importance (ranking) of position delineated

appropriateness of position economic values given
- e.g. compliance with compensative legislation
  consonance with prevailing salaries, wages, and benefits
  impact of collective bargaining
  demand and supply of personnel considered
  standard and cost of living considered
  national economic situation considered
  ability of system to pay
  system variables (school location, special need areas, etc.)

comparative analyses
- e.g. salary, wages, benefits relative to position responsibility
  teachers' salaries compared to nation/state/region
  benefit structures compared
  non-certified/administrative salaries/wages compared
  internal consistency of wages/benefits
  external competitiveness of salaries, wages, benefits

review and updating of structure and position values
- e.g. regularity
  equitableness
  personnel involved in review

effectiveness
- e.g. staff personal satisfaction
  labor union relations
  staff morale/productivity
  retention of employees
  attraction of qualified personnel to system

Security

Tenure

Key Evaluation Concern: Is tenure granted fairly after a pre-specified length of satisfactory probationary employment?

scope of policy concerns
- e.g. salary
  - probationary employment
  - transfer/reassignment
  - abolition of position
  - seniority
  - termination of service/demotion
  - tenure for incoming experienced teachers

adequacy of tenure process
- e.g. staff awareness and understanding
  - administration and Board commitment
  - equitableness of award
  - fairness of professional growth requirements
  - reliability and validity of appraisal procedures
    - (see Performance Appraisal)
  - consistency of length of probationary period
  - consonance with accepted legal procedures/legislation
  - extent of protection re:
    - transfer/reassignment
    - demotion
    - arbitrary action
    - seniority

Security

Academic Freedom

Key Evaluation Concern: Are efforts by the Board and system effective in maintaining students' and teachers' freedom of inquiry and instruction?

adequacy of system philosophy
- e.g. inclusive of both teacher and student freedom of inquiry clauses
  privilege of teaching vs essential condition of learning
  students' rights to study controversial subjects
  basic moral and intellectual commitments to a democratic society

Board of Education responsibilities
- e.g. resistance of special interest group pressure
  understanding of democratic ideals
  understanding of events and materials in the classrooms

adequacy of classroom procedures for dealing with controversial subjects
- e.g. topics appropriate to knowledge, competence and maturity of students
  breadth of coverage
  impartiality, objectivity, and accuracy of teaching approach
  timeliness, significance and importance of topic

Grievance Procedures

Key Evaluation Concern: Do grievance procedures allow for fair and efficient conflict resolution in accordance with negotiated agreements?

scope of resolution mechanisms used
- e.g. informal
  mediation
  arbitration
  appeal

adequacy of procedures
- e.g. timeliness of resolution
  extent of staff involvement in development and administration of procedures
  equitableness of resolutions
  mutuality of conflict

relationship of grievance to negotiated agreement and administration procedures
- e.g. adequacy of resolution mechanism
  weaknesses in negotiated agreement
  clarity of grievance policy

Employment

Influences

Key Evaluation Concern: What are the factors that influence employment policy? Do these factors generally constrain or facilitate fair employment practice?

political
- e.g. teacher association/union
  parent-teacher organizations
  special interest groups

organizational
- e.g. extent of staff turnover
  enrollment projections
  system use of part-time and temporary personnel
  system use of contracted services
  system use of community agencies for school functions
  union relationships

district policy re:
- e.g. probationary employment
  seniority/tenure
  internal promotion and transfer (see Transfer, Promotion, Dismissal)
  nepotism
  residency requirements
  use of part-time and temporary personnel

legal
- e.g. equal opportunity employment/affirmative action legislation
  other federal employment legislation
  individual labor related suits (discrimination, bias, etc.)

economic
- e.g. current revenues/costs
  projected revenues/costs

Employment

Staffing Needs

Key Evaluation Concern: Is the range of manpower planning information comprehensive enough to permit accurate staffing need projections?

scope of manpower profile
- e.g. total number
  - number in categorical areas
  - area distribution
  - sex distribution
  - minority group membership
  - projected retirements/resignations
  - educational levels

scope of target group growth profile
- e.g. five year projection of
  - mobility patterns
  - birth rate
  - content areas with increasing/decreasing enrollment
  - zoning/building patterns

(see CURRICULUM AND INSTRUCTION, Target Group)
(see PUPIL PERSONNEL, Pupil Census)

scope of funding profile
- e.g. millage history
  - projected increases/decreases in financial support
  - stability of state/federal funded areas
  - changes in funding/educational priorities
  - emergence of mandated programs/personnel

current and projected personnel ratios
- e.g. teacher/pupil
  - administrator/pupil
  - non-certified staff/pupil
  - past ratios/present ratios
  - present ratios/five-year projected ratios

comprehensiveness of trend analysis
- e.g. projected turnover in categorical areas
  - projected turnover by buildings
  - teacher shortage/surplus areas
  - community educational priorities
  - state/federal funding priorities
  - district programming priorities
  - target group characteristics/needs
  - population increases/decreases

Employment

Recruitment and Screening

Key Evaluation Concern: Are recruitment and screening activities effective in producing adequate numbers of qualified position candidates?

scope of recruitment sources
- e.g. intrasystem transfers/promotions
  placement bureaus
  employment agencies
  unions/professional associations
  unsolicited applications
  advertising
  field recruiting
  temporary-help organizations
  recruitment on campuses

scope of recruitment activities
- e.g. establishment of employment standards
  development of job descriptions
  development of job classifications
  communications to applicants

adequacy of recruitment activities
- e.g. timeliness of correspondence
  comprehensiveness of collected information
  accuracy of collected information
  security of confidential information
  indirect/direct costs
  number/characteristics of individuals contacted

adequacy of screening procedures
- e.g. specificity of job analysis/description
  validity and reliability of screening methods/documents
  time efficiency
  indirect/direct costs

effectiveness
- e.g. number of applicants per vacancy
  number of offers/rejections
  number/characteristics of applicants
  time between job opening and hiring
  time between initial contact and interview
  real/perceived inequity
  cost per recruiter per hiring

Employment

Personnel Selection

Key Evaluation Concern: Do selection procedures allow for efficient and accurate selection of appropriately qualified personnel to fill staff vacancies?

scope of selection information used
- e.g. candidates resume
  - transcripts
  - medical tests
  - background information/application
  - testing information
  - interviews
  - peer/supervisor ratings
  - references

appropriateness of selection information
- e.g. reliability within and across methods/documents
  - validity (relevance of selection device to job)
  - comprehensiveness
  - cultural fairness
  - sexual fairness
  - cost efficiency

adequacy of selection activities
- e.g. timeliness
  - congruence with employment legislation
  - parsimoniousness
  - defensible procedures

effectiveness
- e.g. frequency of voluntary resignations after one year of service
  - frequency of suspensions/resignations after one year of service
  - extent of congruence of employee qualifications with position description
  - direct/indirect costs to system for training/replacement
  - satisfaction of employees (opinionnaires/morale/absenteeism)
  - appraisals of personnel by supervisors/students/peers

Employment

Orientation of Personnel

Key Evaluation Concern: Is the orientation process effective in meeting new employee information and personal needs, and how is overall system performance affected?

scope of orientation information
- e.g. duties and responsibilities of position
  characteristics of the school system
  characteristics of the community
  school/community relations
  personal adjustment
  social adjustment

adequacy of orientation information
- e.g. relevance to individual
  appropriateness to position
  comprehensiveness
  accuracy
  timeliness

method of orientation
- e.g. group sessions
  individual or "buddy" assignments
  printed informational material
  pre-employment interviews/discussions

effectiveness
- e.g. personnel satisfaction with position and system
  receptiveness of system personnel to new employees
  rate of professional adjustment/acceptance
  effect of new employees on overall system performance
  policy errors commonly made by new employees

References

1. American Association of School Personnel Administrators. Guidelines for professional staff selection. Seven Hills, Ohio: AASPA, 1977. (ERIC Document Reproduction Service No. ED 148 014.)

These guidelines are intended to provide personnel administrators with a means of evaluating their current practices and procedures in teacher selection. The guidelines cover recruitment, hiring criteria, employment interviews, and follow-up to selection.

2. American Psychological Association. Principles for the validation and use of personnel selection procedures. American Psychological Association: Division of Industrial-Organizational Psychology, 1975.

Technical and authoritative guidelines which allow one to evaluate inappropriate selection procedures and instruments and to plan appropriate procedures.

3. Batten, J. E. Work planning and performance appraisal: A reference handbook for managers and supervisors. Salem, Oregon: Oregon State Executive Department, Training and Staff Development Unit, 1977. (ERIC Document Reproduction Service No. ED 147 963.)

This handbook discusses employee performance appraisal and offers step-by-step guidelines to aid supervisors in this process. The appendix contains examples of position descriptions, work plans, and performance appraisal reports drawn from a variety of state agencies.

4. Borich, G. D., Madden, S. K. Evaluating classroom instruction: A sourcebook of instruments. Reading, Mass.: Addison-Wesley Publishing Company, 1977.

A brief but thorough assessment of approximately 200 instruments used to evaluate teachers, pupils, and classrooms. An excellent resource for those responsible for selecting or assessing instruments used to evaluate instruction.

5. Castetter, W. B. The personnel function in educational administration. New York: MacMillan, 1971.

This book is especially useful as a guide to various control points within the school personnel area. It offers provocative questions and alternative methods of monitoring and assessing all components in the personnel area. Special attention has been given to concerns of manpower planning, personnel security, continuity of service, collective negotiations, and organizational democracy. More textbook than handbook in orientation.

6. Martin, M. A framework for the identification of information needs in program evaluation. (Doctoral Dissertation, Cornell University, 1978). Dissertation Abstracts International, 1978, 38 7809470.

Valuable, field-tested outline of program evaluation concerns. The framework identifies a comprehensive list of program components: history, actors, objectives, curriculum, process, evaluation, etc. Each entry also contains an evaluation question. The outline would be an efficient and useful tool to prepare for a needs assessment or evaluation of any program in any school area.

7. Matthews, M., McCune, S. Complying with Title IX: Implementing institutional self-evaluation. U. S. Department of Health, Education, and Welfare: Office of Education, 1976.

A handbook focusing upon those provisions of the Title IX regulation which most directly affect local education agencies. Suggests criteria and procedures for implementing institutional self-evaluations in such areas as access to courses, counseling, treatment of students, financial assistance, employment, etc.

8. Piele, P. K. The yearbook of school law, 1978. Topeka, Kansas: National Organization of Legal Problems in Education, 1978.

The Yearbooks of School Law provide comprehensive and objective summaries and analyses of the previous year's state appellate court decisions. All federal court decisions and holdings of record that either involve or affect public education in the United States are also included.

9. Position Analysis Questionnaire. University Bookstore, 360 State Street, West Lafayette, Indiana 47906.

The PAQ is essentially a structured job analysis questionnaire that can be used for analyzing virtually any job or position. This instrument is said to have potential for reducing judgmental errors in job analysis by making it more quantitative and objective.

10. Simon, A., Boyer, E. G. (eds.) Mirrors for behavior: An anthology of classroom observation instruments. 14 vols. Philadelphia: Research for Better Schools, 1967-70.

This encyclopedic collection includes observation instruments that assess any array of classroom variables. It lists technical information about the instrument (validity, reliability, etc.) if it is available. It contains both published and fugitive instruments.

11. Stallings, J. A. Learning to look: A handbook on classroom observation and teaching models. Belmont, California: Wadsworth Publishing Company, 1977.

A valuable guide to systematic classroom observation. The book illustrates a number of observational systems, focusing on an observation instrument developed at Stanford Research Institute. Additionally, examples of the use of observational systems with diverse educational theories and approaches is provided.

Pervasive Program Concerns

Mission

Key Evaluation Concern: Is the district's stated mission grounded on sound principles and is it influential in formulating goals and objectives?

origin
- e.g. community expectations
  - school board/school personnel
  - educational theory
  - constitutional rights
  - legislative mandates
  - district needs assessment

responsibility to students
- e.g. acquisition of life skills
  - preparation for work world
  - citizenship
  - educational achievement
  - self esteem

boundaries of responsibility
- e.g. school vs parental responsibilities
  - school vs church responsibilities
  - school vs community responsibilities

appropriateness
- e.g. in light of the student body
  - democratic principles
  - community values/expectations
  - staff capability
  - state goals

review and revision
- e.g. provisions for review/amendment
  - protocol/procedures for revision
  - criteria for amending
  - perspectives involved in revision process
  - history of review/revision/refinement

impact
- e.g. influence of mission on curriculum design
  - congruence of goals with district mission
  - influence of mission on the educational process

Pervasive Program Concerns

Goals

Key Evaluation Concerns: Have goals been developed in light of the district's mission? How well have goals been coordinated and focused on relevant need areas?

coordination of goal setting
- e.g. district-wide
  - building and program level
  - grade level
  - overarching skill areas (reading)
  - classroom (instructional)

focus of goals
- e.g. cognitive achievement/content acquisition
  - values/attitudes
  - life skills/work skills
  - general education vs special interest education
  - learner vs teacher behaviors

authoritative base
- e.g. federally mandated
  - state mandated
  - district priorities
  - school personnel/specialists
  - accreditation requirements
  - educational theory
  - district-identified needs

relevance of goals
- e.g. suitable for student body/community
  - congruent with district priorities/mission statement
  - contemporary--free from obsolete concepts
  - usefulness in teacher planning
  - accepted by relevant audiences
  - reviewed/revised/refined systematically

Pervasive Program Concerns

Objectives

Key Evaluation Concerns: Do objectives reflect stated goals and mission? How adequate are procedures for developing, focusing, and modifying objectives?

focus of objectives
- e.g. life skills
  - basic skills
  - cognitive achievement
  - social skills
  - emotional adjustment

producing objectives
- e.g. personnel involved in developing objectives (district/building/classroom)
  - training in developing objectives available to personnel
  - procedures for refining/revising objectives
  - procedures for monitoring implementation of objectives

bases for modification of objectives
- e.g. regular review and modification
  - change in employment patterns
  - student population changes
  - knowledge explosion
  - student perceptions of needs
  - reactions/success of graduated students
  - change in district priorities
  - leadership changes
  - expert review

appropriateness
- e.g. difficulty level appropriate and attainable
  - objectives appropriate to goals
  - objectives important for further learning
  - objectives appropriate for target group
  - clearly stated
  - important (encourage further learning by pupils)

Pervasive Program Concerns

Influences

Key Evaluation Concerns: What major contextual factors influence curriculum? Are these influences constraining or supportive of curriculum design and implementation?

legal
- e.g. school law
  constitutional provisions
  court decisions
  state course requirements
  observance of special days
  work required for graduation
  teacher certification requirements
  attendance laws
  state-approved texts
  local school board policy
  federal guidelines in funded areas

quasi-legal
- e.g. accreditation requirements
  national and state assessments
  accountability programs

political
- e.g. support of elected school leaders
  support of formal/informal power structure
  newspaper editorial policy/posture towards school

economic
- e.g. community economic status
  eligibility for federal/state funds
  millage success/defeat
  national inflation and interest rates

community
- e.g. support of schools
  aspirations for children
  (see also SCHOOL-COMMUNITY RELATIONS, Historical Analysis)

tradition
- e.g. past practice
  teacher training and experience
  educational beliefs and values

professional
- e.g. model programs
  results of educational research
  national curriculum developments
  innovative movements

Pervasive Program Concerns

Target Group(s)

Key Evaluation Concerns: Is there a clear definition of the target group? What are the special needs and concerns of the target group?

identification of
- e.g. personnel responsible
  - school data base
  - technological support
  - data integrated from outside agency
  - scheduling/timing

characteristics
- e.g. age
  - sex
  - special physical/emotional needs
  - achievement record
  - past educational experiences
  - socioeconomic status
  - parents' educational background
  - race
  - ethnic/cultural heritage
  - primary language
  - special abilities
  - learning characteristics such as experience, intelligence, motivation, emotions, personality, creativity, social, speech and auditory, visual, and motor perception

goals of target group(s)
- e.g. perceived needs of target group(s) (as reported by students/parents/school personnel)
  - authoritative base for goals established for target group (logic, research, theory, consensus)
  - aspirations of target group(s)
  - congruence of students' aspirations/needs with curricular design

Pervasive Program Concerns

Personnel

Key Evaluation Concern: Are personnel in the curriculum area appropriately qualified, assigned, and supported?

types
- e.g. teachers
  - aides
  - volunteers
  - special consultants
  - media library staff
  - speech and hearing teachers
  - special education teachers
  - psychologists
  - curriculum specialists

qualifications
- e.g. educational background
  - certification
  - special training
  - special qualifications

number
- e.g. per pupil ratio
  - within subgroups such as experience levels, age levels, sex, ethnic origin, tenure

basis for assignment
- e.g. seniority/tenure
  - voting procedure
  - merit system/achievement
  - administrative choice
  - contractual agreements
  - educational background
  - past success/failure
  - evaluation
    - (see also STAFF PERSONNEL, Appraisal)

adequacy of assignment strategy
- e.g. percentage of teachers teaching in major area of study
  - absenteeism
  - disciplinary referrals
  - student reaction to courses
  - enrollment patterns
  - student evaluations
  - teacher organization reactions
    - (see also STAFF PERSONNEL, Bargaining)
  - number of grievances
  - number of courses/programs lacking teachers

Pervasive Program Concerns

Personnel

continuity in staffing
teacher satisfaction
administrator satisfaction
job performance
target group performance
match between position requirements and teacher credentials and experiences

support personnel assigned
e.g. availability
training
type of assignments
setting

effectiveness of support personnel
e.g. teachers served
administrators served
students served
satisfaction of teachers/students/support personnel/administrators
improved skills/learning

Pervasive Program Concerns

Materials

Key Evaluation Concern: Are curriculum materials appropriately selected and effectively organized and used?

types
- e.g. textbooks
  - workbooks
  - curriculum guides
  - supplementary readers
  - television programs
  - slides
  - filmstrips and film loops
  - prerecorded tapes
  - records
  - computers
  - self-instructional materials
  - kits

orientation
- e.g. general goals and aims
  - types of activities implied
  - underlying theory (content and learning)
  - background of developers

relevance
- e.g. suitability to target audience
  - value stance
  - cultural experience
  - sexual mores
  - suitability of language
  - readability

timeliness
- e.g. free from obsolete concepts
  - date printed/revised/updated

congruence
- e.g. with district goals
  - with program/classroom objectives
  - with target group characteristics

structure
- e.g. logical breakdown of content area
  - sequenced by learning tasks
  - arranged around general need areas

Pervasive Program Concerns

Materials

sequencing
- e.g. by subject field
  - within subject field
  - for learner development

scope and balance
- e.g. variety of content covered
  - variety of theories presented
  - pluralistic values represented
  - focus of content

practical considerations
- e.g. cost (initial, upkeep, replacement)
  - supplementary materials available (student handbooks, teacher guides)
  - structured activities recommended
  - time necessary to use
  - attractiveness
  - durability

influences on selection of curriculum materials
- e.g. budget
  - special interest groups
  - college entrance requirements
  - legislation
  - accreditation requirements
  - university recommendations
  - state department
  - educational trends
  - teacher interest
  - student interest

responsibility for selection in decision settings (district/school/classroom)
- e.g. curriculum committees
  - board of education
  - content specialists
  - curriculum specialists
  - teachers
  - administrators
  - students
  - parents

access to materials
- e.g. by subject area
  - by course
  - by units or themes
  - by learner development
  - by curricular objectives

Pervasive Program Concerns

Materials

classification system
- e.g. district-wide system
  - subject-field organization
  - departmental library system
  - classroom organization

access
- e.g. location(s) of materials
  - responsibility for distributing
  - ease of access
  - time of access
  - persons served/not served
  - materials included/not included

adequacy for instructional use
- e.g. content validity/reliability
  - transfer value
  - cognitive emphasis
  - relevance to students' aspirations/needs
  - reinforcing for later learning
  - language (suitable/accuracy)
  - logic of organization
  - congruence with goals/objectives
  - relationship across materials (articulation, scope, sequence)
  - practical for teacher use (training needed)
  - clarity
  - appropriate difficulty level
  - interesting (aimed at which student group)
  - student response (attention/involvement/learning)
  - teacher response

Pervasive Program Concerns

Environment

Key Evaluation Concern: How does the physical and psychological environment affect the delivery of curriculum and instruction?

adequacy of facilities
- e.g. space arrangements (seminar rooms, lecture halls, classrooms, modules)
- stations per spacial area
- movable/immovable furniture
- accoustics
- lighting/windows
- electrical wiring for equipment
- condition of room/furniture
- resource centers (labs, filming rooms)

design efficiency
- e.g. arrangement (configuration) of classrooms
- isolated units/classrooms/programs
- space in-common to curricular areas
- accessibility of facilities to students, teachers, administrators
- flexibility of curricular setting
- rationale for curricular (spacial) organization
- appropriateness of spacial organization in light of curricular goals/activities

climate
- e.g. open vs closed
- structured vs unstructured
- supportive vs critical
- enthusiastic vs bland
- flexible vs rigid
- dynamic vs routine
- interactive vs authority dominated

decision making
- e.g. participatory (teachers and administrators)
- autocratic (centralized decision making)
- district office centered
- building centered

scheduling
- e.g. typical time allotments for classes (1 hour vs double periods)
- length of day
- number of schedule interruptions per week

(see also Scheduling and Structuring)

Pervasive Program Concerns

Curriculum Design

Key Evaluation Concern: Is the curriculum designed and maintained so that it effectively meets program goals and objectives?

program of studies
- e.g. academic courses
  - cultural courses
  - occupational courses
  - special education courses
  - extracurricular activities
  - support services

orientation of curriculum
- e.g. ordered by logic and structure of subject fields
  - ordered and structured by learner's/learners' needs
  - ordered by common or core needs and objectives
  - fused within subject areas
  - fused across subject areas
  - ordered by unifying themes
  - unified studies based upon common learning needs

focus of curriculum design (activities/analysis)
- e.g. district-wide
  - building
  - program
  - classroom
  - individual

structure
- e.g. evidence of articulation
  - scope/sequence
  - balance
  - continuity

implementation of curriculum design
- e.g. materials
  - procedures
  - activities
  - schedule
  - personnel

appropriateness
- e.g. relevance of design to student body
  - satisfaction of students/community/staff
  - success of graduates
  - adequacy of staff for implementing design (training/background)
  - content balance (areas of knowledge/attitudes/skills)
  - relationship of design to district goals/priorities
  - relationship of design to diagnosed needs of group/individual

Pervasive Program Concerns

Curriculum Design

quality control of curriculum design
- e.g. base line data collected (end-of-course evaluations, observations, attitude surveys, judgments, instructional methods assessment, standardized achievement tests, criterion referenced/competency based tests)
- comparison of base line data (past/present)
- evidence of ineffectiveness (general decline in achievement, decline for particular group, decline in particular learning areas)
- personnel involved in quality control (experience/background)
- timing/frequency of quality control efforts

Pervasive Program Concerns

Courses Within Curriculum

Key Evaluation Concerns: What courses are being offered; do they contribute to district curriculum priorities?

configuration
- e.g. organization of courses within district/building/program
  - constellations of courses
  - general areas of emphasis

balance
- e.g. preprofessional vs vocational
  - academic vs cultural
  - life skills vs special interest

number
- e.g. building totals (comparisons of)
  - courses required for graduation
    - percentage of total program
    - accessibility to typical student/special student
  - elective courses
    - accessibility to typical student/special student

enrollment patterns
- e.g. courses elected/avoided by students
  - course areas with increasing/decreasing enrollment
  - analysis of past enrollment patterns
  - procedures for anticipating future enrollments

content
- e.g. actual information in courses
  - congruence of content with course title
  - revision of content (frequency/extent/responsibility for)
  - congruence of content/objectives with district/building goals

organization of content
- e.g. based upon the structure of the subject
  - based upon learner needs
  - based upon common objectives

relationship of courses
- e.g. sequenced
  - articulated
  - balanced (see also Articulation, Balance, Continuity, Scope and Sequence)

Pervasive Program Concerns

Scheduling

Key Evaluation Concerns: What considerations are involved in student and teacher scheduling? How adequately does the scheduling strategy attend to district priorities and individual needs/aspirations?

program of study (scheduling considerations)
- e.g. standard course load
  graduation requirements
  special education programs
  extra-curricular activities

adequacy of district-wide/building schedules
- e.g. responsibility for planning/implementing
  attention to district priorities in scheduling
  impact of transportation considerations
  procedures to forecast scheduling needs
  ability to modify scheduling

appropriateness of teacher scheduling
- e.g. rationale for assignments (see also Personnel)
  supervision of instruction schedules

adequacy of individual student scheduling
- e.g. responsibility for student schedules
  placement of students (responsibility and rationale)
  parental input
  student involvement
  teacher involvement
  graduates' appraisal

Pervasive Program Concerns

Articulation

Key Evaluation Concern: How adequately have curriculum activities been systematically organized and interrelated to promote continuity of learning for students?

types of articulation
- e.g. horizontal coordination of experiences
  - across concurrent programs
  - across subject areas
  - across grade levels
- vertical coordination of experiences
  - home to school
  - K-12
  - school to work/post secondary

focus of articulation
- e.g. individual student
- groups of students
- subject fields
- buildings
- total school program

implementation of articulation
- e.g. assessment of incoming skills
  - team teaching
  - team planning
  - sequencing of content
- inservice education
- shared knowledge of school-wide programs
- systematic communication efforts

Pervasive Program Concerns

Balance

Key Evaluation Concerns: Has the curriculum been designed to equitably present a balanced program to achieve district priorities? How well is the curriculum balanced in light of district priorities, student needs/aspirations, and school capabilities?

balance identified in district priorities and goals
- e.g. school vs parent responsibilities
  school vs community/church responsibilities

orientation of curricular program
- e.g. preprofessional/vocational
  general education/special-interest education
  affective/cognitive goals
  typical/special student

composition of curricular program
- e.g. subjects offered/required
  programs available/recommended
  time allotments for subjects
  curriculum materials used (see also Materials)
  personnel involved (see also Personnel)

appropriateness of curriculum in light of
- e.g. district goals
  student body
  instructional capability
  special students
  individual student

adequately balanced curriculum
- e.g. specified need for students
  rationale for weighting importance of curriculum needs
  congruence of weighting with identified needs

Pervasive Program Concerns

Continuity

Key Evaluation Concern: Are necessary schooling transitions anticipated and their effects minimized to provide continuity in learning experiences?

transitions in schooling
- e.g. home to elementary
  elementary to secondary
  secondary to work/post secondary

obstacles to continuity
- e.g. separation of schools
  change in philosophies
  differing attitudes
  differing teaching strategies/instructional materials
  staff changes

promoting continuity
- e.g. homerooms
  class advisers
  guidance programs
  K-12 curriculum planning
  orientation programs
    - for students (handbooks)
    - for parents (parent days)

Pervasive Program Concerns

Scope and Sequence

Key Evaluation Concern: How effectively are activities selected and arranged to provide a broad and coordinated educational program for students?

involvement in curriculum decisions
- e.g. curriculum specialists
  - curriculum committees
  - teachers
  - students
  - administrators

coordination of curriculum decisions
- e.g. district-wide
  - building level
  - subject field
  - special program areas
  - classroom

criteria for selecting curricular content
- e.g. values orientation
  - suitability
  - to achieve objectives
  - required (federal/state/district)
  - learner developmental needs
  - learner interests
  - teacher interests
  - expert authority
  - practical experience
  - test results
  - tradition
  - trends
  - availability

focus of curricular content
- e.g. knowledge of key concepts
  - acquisition of skills
  - subject - field structure
  - learner needs
  - learner attitudes/values

articulation of curricular content
- e.g. content coordinated across programs (horizontal)
  - content coordinated between (K-12) grade levels (vertical)

number of times content is presented
- e.g. K-12
  - within a program
  - within a course

Pervasive Program Concerns

Scope and Sequence

timing
- e.g. grade or age level content is introduced/reviewed/mastered

sequencing of content
- e.g. chronological
  - logical consistency within discipline
  - hierarchical objectives
    - enabling objectives to achieve learner skills
  - simple to complex
  - concrete to abstract
  - student maturation
    - based upon theories of learning
    - based upon previous education

scope of curriculum
- e.g. variety of perspectives
  - varying difficulty levels
  - representation of pluralistic values
  - variety of mediums (film, records, texts)
  - variety of programs related to student aspirations
  - programs for special student needs

Pervasive Program Concerns

Instructional Conditions

Key Evaluation Concerns: What existing conditions (not directly controlled by the teacher) affect instruction and how do they impact the instructional setting?

district priorities
- e.g. vocational vs preprofessional emphasis
  basic skills vs special interest education
  cognitive vs affective

instructional goals
- e.g. state/federal instructional requirements
  district instructional goals
    - degree of specificity
    - degree of accountability

curricular organization
- e.g. subject centered vs student centered
  core vs elective
  teacher groupings
  scheduling
  amount of class time
  number of interruptions

instructional setting
- e.g. district grouping
  segments (such as K-5, 6-9, 10-12)
  ability placement
  placement for balance
  building grouping
  classroom grouping

climate
- e.g. physical space (facilities)
  condition
  location
  suitability for purpose
  psychological (management)

resources
- e.g. materials (see Materials)
  support personnel (see Personnel)
  consultants

Pervasive Program Concerns

Instructional Conditions

student characteristics
- e.g. age
  - experiential background
  - sex
  - SES
  - language fluency
  - past achievement record
  - prior instruction
  - aspirations
  - special needs
    - gifted/talented
    - remedial/handicapped

constraints
- e.g. political
  - socio-cultural (religious values, social values)
  - economic
  - pedagogical (training and assumptions about education)

Pervasive Program Concerns

Instructional Methods

Key Evaluation Concern: Are instructional activities systematically planned, organized, and implemented in light of curricular goals?

goals specified
- e.g. learning theory espoused
  - assumptions regarding students/learning
  - congruence with district program goals

adequacy of objectives
- e.g. central objectives
  - supporting objectives
  - congruence of objectives with stated goals (district/program)
  - level of difficulty
  - categories (cognitive/affective/psychomotor)

target behaviors
- e.g. affective
  - cognitive
  - psychomotor

scope of delivery
- e.g. lecture
  - discussion/questioning
  - laboratory
  - role playing

content organization
- e.g. selection of content
  - based upon objectives
  - based upon learner development
  - based upon logic of subject field
- scope and sequencing
- articulation
- balance
- continuity

management
- e.g. teacher/student controlled
  - time spent on tasks
  - non-directed time
  - congruence with objectives
  - testing time

disciplinary concerns
- e.g. teacher/student negotiated
  - teacher controlled
  - student controlled
  - teacher referred

Pervasive Program Concerns

Instructional Methods

style
- e.g. formal vs informal
  - serious vs humorous
  - structured vs enthusiastic
  - critical vs complimentary

type of activities
- e.g. large group
  - small group
  - individual

nature of activities
- e.g. listening
  - watching
  - talking, singing, reading, dancing

purpose of activities
- e.g. achieve objectives
  - acquire skills
  - gain appreciation
  - develop concepts

extracurricular activities
- e.g. sponsored clubs
  - science/art fairs
  - trips
  - special events

preparation
- e.g. short range/long range
  - clarity/continuity
  - group/individual focus

record keeping
- e.g. short & long range lesson plans
  - individual vs group focus
  - for improvement such as
    - categorizing
    - organizing
    - analyses/grading
  - teacher oriented administrative decisions
  - central office oriented administrative decisions

Pervasive Program Concerns

Instructional Methods

motivational strategies emphasized
- e.g. extrinsic such as
  - grades
  - recognition
- intrinsic such as
  - aspirations
  - career goals

interactions with students
- e.g. directive
  - structured
  - formal
  - teacher controlled
- non-directive
  - student/teacher structured
  - informal
  - mutual participation

effectiveness of teaching-learning strategy
- e.g. economy (time/resources necessary for learning process)
- degree of pupil participation
- research/experimentation results
- feasibility (demands vs constraints)
- teacher competence (attitude/professional readiness for selected strategy)

Pervasive Program Concerns

Change and Innovation

Key Evaluation Concern: Have change and innovation activities effectively brought improvement to curriculum activities?

types of change activities
- e.g. compelling change
- educational trends
- mandatory
- planned change
- unplanned changes

events precipitating change/innovation
- e.g. attendance/dropouts
- discipline/vandalism
- success of graduates
- test scores
- percentage of failures
- student needs (see Volume I, Toledo Catalog)
- changing priorities/leadership
- evaluation/accreditation/needs assessment results
- staff development (see Staff Development)
- critical problems (busing, discipline, declining enrollment)
- new knowledge in subject fields
- new knowledge about health/education/welfare
- research
- social pressure (parents/community)
- economic/political events

resistance to change
- e.g. inertia (tradition of little change)
- insecurity (fear of failure)
- resistance by power structure/by staff
- finances/costs
- time needed to develop/implement

events to promote change
- e.g. decision-making responsibility
- staff development activities
- released time/substitutes
- change agents available
- support structure available (research, development, implementation, adoption, assimilation)

effectiveness of innovation
- e.g. response to a local need
- clearly related to identifiable problem
- significant investment in problem/innovation area
- staff trained to deliver
- adequate ongoing evaluation
- implemented at a manageable scale
- supported by stable leadership

Pervasive Program Concerns

Change and Innovation

need for change
- e.g. dropouts
  - attendance
  - discipline
  - success of graduates
  - standardized test scores
  - school morale
  - vandalism
  - percentage of failures
  - student needs (see Volume I, Toledo Catalog)
  - relevance of philosophy
  - congruence of philosophy with practice
  - recommendations of evaluation
  - innovations
  - professional activities
  - articulation
  - management
  - knowledge explosion

Pervasive Program Concerns

Staff Development

Key Evaluation Concern: Are staff development efforts effectively meeting staff improvement needs?

type of staff development efforts
- e.g. district inservice courses
  - university inservice courses
  - continuing education courses
  - advanced degree programs
  - guest speakers
  - program consultants
  - site visits
  - symposia
  - films
  - university-district coordinated programs
  - workshops
  - professional meetings/conferences

target audiences
- e.g. teachers
  - administrators
  - school board members
  - counselors
  - media specialists/librarians
  - aides
  - volunteers

orientation of staff development
- e.g. issue based (discipline, drug education)
  - skill improvement (contract learning, test construction, classroom management)
  - attitudinal (cultural awareness, effects of sex stereotyping)

responsibility for initiating staff development
- e.g. administrators
  - teachers/teacher organization
  - program areas
  - community/parents
  - state/federal governments

events precipitating the need for staff development
- e.g. requested by teachers/teacher organizations, by student/parents, by administrators
  - new knowledge in field
  - new techniques/skills needed
  - new programs
  - priorities
  - lack of student progress
  - educational trend (elective curriculum)

Pervasive Program Concerns

Staff Development

critical issues (discipline, drugs)
special student needs (gifted, handicapped)
change in student population
new requirements
needs assessment

attendance
e.g. number and types of personnel attending (optional, mandatory)
stated purposes for attending
reasons staff did not attend

impact on attitudes and skills
e.g. assessment of staff response (observation)
reported satisfaction of staff (questionnaire)
evidence of improvement in related area

cost of staff development
e.g. cost to district
cost to staff
cost effective

congruence of staff development with stated priorities
e.g. alignment of district priorities and staff development activities
important attitudes/values
relevance of staff development activities

References

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3. Borich, G. D., Madden, S. K. Evaluating classroom instruction: A sourcebook of instruments. Reading, Mass.: Addison-Wesley Publishing Company, 1977.

A brief but thorough assessment of approximately 200 instruments used to evaluate teachers, pupils, and classrooms. An excellent resource for those responsible for selecting or assessing instruments used to evaluate instruction.

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6. Lewy, Arieh, (ed.) Handbook of curriculum evaluation. Paris: UNESCO, 1977.

A comprehensive and up-to-date discussion of evaluation strategies related to curriculum development and curriculum evaluation. Contains a number of examples, checklists, and resources to aid in the construction of instruments. It can be used for evaluating materials, methods, curriculum implementation, quality control, and existing evaluation techniques.

7. Martin, M. A framework for the identification of information needs in program evaluation. (Doctoral Dissertation, Cornell University, 1978). Dissertation Abstracts International, 1978, 38, 7809470.

Valuable, field-tested outline of program evaluation concerns. The framework identifies a comprehensive list of program components: history, actors, objectives, curriculum, process evaluation, etc. Each entry also contains an evaluation question. The outline would be an efficient and useful tool to prepare for a needs assessment or evaluation of any program.

8. Matthews, M, McCune, S. Complying with Title IX: Implementing institutional self-evaluation. U. S. Department of Health, Education, and Welfare: Office of Education, 1976.

A handbook focusing upon those provisions of the Title IX regulation which most directly affect local education agencies. Suggests criteria and procedures for implementing institutional self-evaluations in such areas as access to courses, counseling, treatment of students, financial assistance, employment, etc.

9. Simon, A., Boyer, E.G. (eds.) Mirrors for behavior: An anthology of classroom observation instruments. 14 vols. Philadelphia: Research for Better Schools, 1967-70.

This encyclopedic collection includes observation instruments that assess an array of classroom variables. It lists technical information about the instrument (validity, reliability, etc.) if it is available. It contains both published and fugitive instruments.

10. Stallings, J. A. Learning to look: A handbook on classroom observation and teaching models. Belmont, California: Wadsworth Publishing Company, 1977.

A valuable guide to systematic classroom observation. The book illustrates a number of observational systems, focusing on an observation instrument developed at Stanford Research Institute. Additionally, examples of the use of observational systems with diverse educational theories and approaches is provided.

Accounting for Resources

Internal Auditing

Key Evaluation Concern: Has the internal auditing process examined and evaluated the adequacy and effectiveness of the district's system of internal control?

personnel involved (number and training)
- e.g. planning the audit (selecting audit areas)
  examining, evaluating information (audit process)
  reviewing audit information
  communicating results
  follow-up activities

management of audit
- e.g. statement of purpose, authority, responsibility
  timeline established (timing/frequency)
  uniform accounting system for monitoring
  inservices provided
  supervision provided
  coordination of internal/external audit efforts
  quality-control program

organizational status of auditor/auditing department
- e.g. independence (line of authority)
  objectivity (conflict of interest)
  adequate staffing (technical proficiency)

scope of audit concerns
- e.g. reliability/integrity of financial and operating information
  means used to identify, measure, classify, report information
  compliance with relevant policies
  compliance with relevant plans
  compliance with relevant procedures
  compliance with relevant laws
  compliance wtih relevant regulations
  verification of assets
  means of safeguarding assets reviewed
  economic/efficient use of resources appraised
  program operations consistency with funded objectives reviewed
  review/consult regarding regular program financial reports

effectiveness of internal auditing
- e.g. adequate audit coverage/minimal duplicate efforts
  coordination with external auditors (techniques, methods, terminology)
  quality assurance (supervision, internal/external review)
  compliance with Board of Education policies
    State Auditors Office guidelines
    state regulations

Accounting for Resources

Internal Auditing

clerk-treasurer procedures
relevant laws
professional standards
reports and recommendations (timely, objective, clear, concise, and constructive)
follow-up on audit findings (corrective action taken)

Accounting for Resources

External Auditing

Key Evaluation Concern: Has the legally required external audit provided effective, efficient and adequate verification of the district's financial management?

scope of district audit responsibilities
- e.g. personnel responsible for selecting audit areas
  - department responsible for monitoring external audit
  - selection of accounting system to monitor budget centers
  - programs necessary to inservice personnel responsible for accounts to be audited
  - coordination of internal/external audit process

efficiency of external audit
- e.g. time schedules/used
  - number of personnel interviews/interruptions
  - total time on external audit
  - turnover time for audit report
  - timeliness of final report

adequacy of audit
- e.g. timely
  - credible (objectivity/independence/and technical proficiency of auditors not questioned)
  - comprehensive (program areas covered/not covered)
  - compliance with legal regulations
  - adherence to professional standards

Accounting for Resources

Inventory Control

Key Evaluation Concern: Has inventory been adequately monitored and controlled to assure sufficient quantities of supplies and equipment?

scope of inventory control procedures
- e.g. timeline for monitoring inventory
  guidelines/system for monitoring inventory
  personnel selected/inserviced
  equipment/supplies inventoried
  inventory level (classroom/department/building)
  reporting mechanism (who/when)

adequacy of inventory control
- e.g. surplus equipment/supplies
  depleted supplies (number of times depleted, reorder/turnover time)
  obsolete items (criteria for this designation, property officer designating)
  coordination of inventory (district/building/program, inventory/exchange system)
  percentage of inventory lost/stolen
  time taken to inventory, replace supplies

accuracy of inventory control
- e.g. percentage of inventory unaccounted for
  duplicate orders
  failure to reorder
  failure to deliver
  failure to report surplus/depletion/obsolete items

(see also Allocating System for Supplies and Equipment)

Budget Management

Budget Preparation

Key Evaluation Concern: Has the budget been prepared so that it clearly describes and justifies levels of total service in light of budgetary constraints?

anticipated revenue
- e.g. local/state/federal monies to be received

projected expenditures
- e.g. supply needs
  - projected student enrollment
  - projected operation/maintenance expenditures
  - capital improvement needs
  - negotiated labor agreements
  - state mandated programs

budgetary influences
- e.g. rate of inflation for fixed costs
  - history of expenditures for programs
  - district priorities
    - areas where service is to be expanded/reduced
  - policies/laws governing school district expenditures
  - adjustments in tax base (millage election)

personnel involved
- e.g. decision makers identified
  - budgetary planning responsibility
  - review/refine responsibility
  - approval/adoption responsibility

adequacy of budget preparation
- e.g. expenditures/revenues/influences well clarified
  - means of securing additional revenue explored
  - tradeoffs clarified
  - ranking of services by district priorities
  - review protocol followed
  - revisions made based upon review process
  - public input/approval of budget
  - (see also Long Range Budget Projections)

Budget Management

Long-Range Budget Projections

Key Evaluation Concerns: What are the long-term anticipated costs of running the district? How adequately have costs/expenditures been described in light of educational services and programming?

sources of income (present and projected)
- e.g. state
  - federal
  - local
  - school-generated
  - private foundations

expenditures (present and projected)
- e.g. personnel (anticipated turnover)
  - facilities (alternative housing plans and implications)
  - transportation (alternative busing plans and implications)
  - supplies
  - equipment (cost, depreciation, maintenance, upkeep)

economic factors
- e.g. present and projected inflation rates, interest rates

educational factors
- e.g. state and district goals
  - Board established priorities
  - special interest group concerns (gifted children, impaired children, busing)
  - teacher/student ratio (present and projected)
  - appropriate use of facilities
  - student needs (test data, surveys from community, students, staff)

political factors
- e.g. legislation impacting budget (existing, in committee)
  - community reactions
    - (see also SCHOOL-COMMUNITY RELATIONS, Historical Analysis)
  - controversial school/community issues
    - school closings
    - busing
    - basic skills
    - millage history
  - union reactions
    - teacher
    - administrator

Budget Management

Long-Range Budget Projections

political impact of projected budget
- e.g. millage implications
  union reactions
  special interest group reactions
  further funding implications

educational impact of projected budget
- e.g. programs lost and gained
  faculty and resource persons lost and gained
  materials and equipment lost and gained
  curricular revisions (expansions, deletions, students affected, faculty affected)

organizational considerations
- e.g. reorganization of student population
  student/teacher ratio (within district/buildings)
  number of schools lost/gained
  size of school (increase/decrease)

Budget Management

Preparation of Appropriations

Key Evaluation Concern: Have appropriations been accurately projected and presented in light of estimated resources, district priorities, and state legal requirements?

appropriations breakdown
- e.g. total estimated resources
  - total dollar amounts from all budget centers
  - district priority services/programs
  - projected budget center expenditures adjusted in light of district priorities
  - expenditures/resources balanced

review protocol
- e.g. budget center managers
  - business manager
  - clerk treasurer
  - superintendent
  - Board of Education
  - public

effectiveness
- e.g. expenditures within estimated resources
  - adjustments specified in line with district priorities
  - timeline followed (April 1 adoption)
  - compliance with state regulations
  - budget managers projections accurate
    - inservice provided for budget managers

Budget Management

Public Budget Review

Key Evaluation Concerns: How adequately has the public been informed about the financial status of the district? Has the community's legal right to review the budget been accommodated?

compliance considerations
- e.g. state regulations related to budget review
  - State Foundation formulas
  - County Budget Commission policies
  - Board of Education policies

scope of budget review procedures
- e.g. timeline for budgetary review/adoption
  - established internal protocol
  - review by County Budget Commission
  - notice of public hearing(s)
  - public hearing(s)
  - Board review/adoption

adequacy of presented budget
- e.g. percentage of error in projected enrollment
  - percentage of error in projected revenue
  - appropriate State Foundation formula used
  - projected revenues/expenditures reviewed by Board
  - Certificate of Estimated Resources received
    - County Budget Commission
  - necessary expenditures for total program maintenance specified
  - budget center breakdown/tradeoffs clear
  - budget justified in light of district priorities

adequacy of public review
- e.g. accessibility of hearing (place/time)
  - attendance (number/nature)
  - materials (availability/clarity)
  - media coverage (degree/nature)
  - atmosphere (open vs closed)
  - school personnel involved
  - school posture (defensive/explanatory)
  - modifications made based upon public review
  - follow-up activities (issues explored/discussed/resolved)

Resource Acquisition

Federal Funds

Key Evaluation Concerns: Is the district aware of federal funds for which it is eligible? Are efforts to secure and maintain federal funds systematic, justifiable, and effective?

scope of funds available
- e.g. state/federal funds available to implement mandated programs and federal laws
- funds available for special need areas to comply with guidelines issued by federal regulatory agencies
- funds for experimentation/piloting to improve the quality of education

budgetary considerations
- e.g. budgetary need areas projected
- funding available in need areas
- statistics/documentation available to justify need areas
- resources (time/money) to apply for funding

practical considerations
- e.g. feasibility of meeting compliance requirements
- chances of securing funding
- resources available to pursue funding request

educational/political considerations
- e.g. restrictions attached to funding
- local control lost
- congruence between school district needs/funded priorities
- long-range educational costs anticipated

personnel involved in funding
- e.g. funding search
- decision to seek funding
- providing data
- preparing application
- reviewing/approving application
- meeting deadline
- providing compliance information
- monitoring compliance
- providing accountability reports

effectiveness of funding acquisition
- e.g. percentage of funds for which district is eligible
- percentage of federal funds sought/secured
- explanations for failure to secure funds (deadlines met, guidelines/application procedure followed, ineligibility, unaware of funding)

Resource Acquisition

Federal Funds

resources taken to apply for funding vs resources gained/maintained/lost
problem areas not eligible for funding
areas overcompensated
compliance regulations not met
accountability history in funded areas

Resource Acquisition

Special State Funds

Key Evaluation Concerns: Is the district aware of special state funds for which it is eligible? Are efforts to secure and maintain state funds systematic and justifiable?

funding search
- e.g. categorical aid available
  procedures to obtain categorical aid
  state funding trends
  long range district educational plan
  educational plan in categorical areas
  statistical data to obtain categorical aid

funding restrictions
- e.g. monies available
  competition for funds
  cost to general fund to obtain/implement categorical aid program
  categorical aid in low priority/non-existent need areas

budgetary considerations
- e.g. (see Federal Funds immediately preceding)

practical considerations
- e.g. (see Federal Funds immediately preceding)

educational considerations
- e.g. (see Federal Funds immediately preceding)

personnel involved
- e.g. (see Federal Funds immediately preceding)

effectiveness of funding acquisitions
- e.g. (see Federal Funds immediately preceding)

Resource Acquisition

Financial Projection of Millage for Levy or Bond Purposes

Key Evaluation Concern: How well has the district anticipated and delineated its financial needs in terms of services and programming?

long-range projection
- e.g. educational plan
  - projected student enrollment
  - cost of operation
  - projected local, state, federal revenues
  - revenue yield per mill
  - cost of negotiating labor contract
  - necessary capital improvements, supplies, equipment, maintenance
    (see also Long-Range Budget Projections)

economic considerations
- e.g. rate of growth of property valuation
  - rate of industrial, commercial, housing growth
  - rate of inflation for non-salary items
  - personnel turnover/anticipated salary range

scope of educational activities (regarding financial projections)
- e.g. audiences identified
  - inservices offered (Board, professional organizations, administrators, teachers, PTA)
  - open meetings/hearings
  - media coverage (news releases)
  - speakers provided by district
  - parent/community involvement
  - materials provided (clarity, appropriateness)

anticipated support
- e.g. community (parent/non-parent)
  - formal/informal power structure
  - media
  - special interest groups
  - professional organizations (teacher, administrator)

effectiveness
- e.g. supportive community
  - informed community (numbers receiving information)
    - clarity/accuracy of information provided
    - supportive/informed school personnel

Resource Acquisition

Investment of Funds

Key Evaluation Concerns: Do investment procedures adhere to legal guidelines and principles of sound fiscal management? Does the public generally have confidence in the way public funds are managed by the district?

governing guidelines/policies
- e.g. Federal Reserve Board regulations
  - Uniform Depository Act (Chapter 135, Ohio Revised Code)
  - state/local regulations governing investment of public funds
  - Board of Education policies
  - state auditors office
  - local banking institutions

due process procedures
- e.g. Board approval of investments
  - public informed of investments

investment research
- e.g. investment publications
  - professional investment meetings
  - investment consultants

types of investment
- e.g. short term
  - certificates of deposit
  - repurchase agreements
- long term (two or more years)
  - municipal bonds
  - bonds
  - treasury certificates

adequacy of bidding procedure
- e.g. adherence to state regulations governing bidding process
- appraisal of local banks
  - number eligible to bid
  - past use of public funds
  - rate of interest
  - financial status
  - portfolio of securities
- compliance with procedures of Federal Reserve Board
- compliance with Uniform Depository Act (Chapter 135, Ohio Revised Code)
- appraisal of interest rate trends
- funds identified for investment (cash flow analysis)
- maximum investment period established
- number of bids solicited
- accessible public record of investment
- obtained rate of interest equal to/higher than going rate

Resource Acquisition

Investment of Funds

adequacy of short-term investments
- e.g. relevant policies followed (State, Federal Reserve Board, Board of Education)
- cash flow analysis (cash entering/payrolls met)
- period of investment time feasible
- number/nature of possible, short-term investments
- compliance with Uniform Depository Act
- appropriate bidding procedure followed

effectiveness of investment procedures
- e.g. idle funds invested maximum period of time
- funds invested at highest rate of interest
- additional revenues gained through investment
- cash flow problems encountered (payrolls/paydates met)
- amount/use of investment revenues
- compliance with laws/regulations
- relationship with local banks

Resource Acquisition

Private Source Money

Key Evaluation Concerns: To what degree has school programming been maintained and supplemented through private source money? Has private source money been effectively used to provide essentials and improvements in inadequate funding areas?

private source money (uses)
- e.g. financing essential operations for which district and tax monies cannot be used
- improving non-curricular activities for which only limited tax monies can be used
- making improvements in inadequately funded areas
- pilot programs in areas for which other resources are not available

feasibility of seeking
- e.g. availability of tax monies
- need areas not covered by tax monies
- need areas not likely to be supported by voters
- cost analysis of areas eligible for private source money
- local foundation monies available
- school fund raising programs available
- costs to pursue private source funding
- competition for private source funding

historical analysis
- e.g. foundations previously supporting
- need areas supported by private sources
- activities/programs previously cut/not supported
- long-range effect of state/federal funding when private sources secured
- community fund raising events
- major community contributors

effectiveness of private source money
- e.g. programs funded through private sources (nature and number)
- percentage of total budget provided
- funds spent for stipulated purposes
- funds spent in light of district priorities
- funders provide additional funding
- improved services/programming result

Resource Acquisition

School Foundation Programs

Key Evaluation Concern: Has the amount of revenue forthcoming from the state for basic education programs been accurately determined, monitored, and accounted for?

accuracy of variables computed for state foundation formula
- e.g. number of certified/non-certified personnel
  classification of personnel
  teacher/pupil ratios
  number of classroom units
  average daily attendance

administration of funds
- e.g. provisions for administering
  personnel responsible
  monitoring responsibility (personnel, schedule)
  accountability reports

effectiveness of application process
- e.g. percentage of error in computed variables in state foundation formula
  accurate projection of state foundation funds
  guidelines for application/deadline followed
  all entitled monies received
  guidelines to govern expenditures adhered to

Purchasing, Allocating, and Disbursement

Safety Inspections

Key Evaluation Concern: Does the district adhere to relevant safety codes, minimizing personal injury and equipment failure?

scope of state/federal codes enforced
- e.g. general building
  - plumbing
  - electrical
  - health and life
  - fire proofing
  - toxic substances (asbestos)

preventive maintenance strategy
- e.g. schedule/timing of equipment maintenance
  - safety program instituted
  - inservice training (films, speakers, training)
  - building repair inspections/requests
  - communication/protocol for maintenance needs
  - hazards sought/eliminated
  - safety needs assessed/identified

safety inspection program
- e.g. focus (equipment, performance)
  - scope (personnel involved)
  - personnel responsible
  - budget
  - material supplied (handbooks, guidelines)

effectiveness of safety inspection program
- e.g. federal and state codes/regulations broken
  - analysis of injuries/equipment failure
  - degree of cooperation in enforcing safety across personnel
  - cost for repair/replacement due to negligence
  - grievances/suits regarding safety precautions
  - support of safety program by labor organizations

Purchasing, Allocating, and Disbursement

Quality Control

Key Evaluation Concern: Have products and services purchased by the district been evaluated in light of their quality and comparative effectiveness?

assessment considerations
- e.g. short range and long range utility (quality/durability)
  comparative pricing
  initial replacement, and upkeep costs
  performance standards
  reputation of company
  district history with item, vendor, service
  competitive alternatives available
  timeliness/means of delivery
  requested payment strategy

scope of assessment strategies
- e.g. samples, demonstrations, displays provided
  potential users' evaluation
  pilot/field testing within district
  district reviews of present/projected items
  consumer evaluation reports

Purchasing, Allocating and Disbursement

Allocation System for Supplies and Materials

Key Evaluation Concern: How well is the need for supplies monitored and how efficiently are supplies delivered to need areas?

long range planning
- e.g. historical patterns of supply use
  - program supply projections
  - spoilable/storable materials used
  - purchase schedule (buying terms)
    - inventory sales
    - slack periods
    - discounts for quantity

storage and supply
- e.g. centralized/decentralized
  - means of distribution
  - efficiency (turnover time from order to receipt)
  - amount of storage available
  - quantity of supplies stored

inventory (see Inventory Control)

purchasing
- e.g. competitive bidding
  - amount of duplication/waste
  - vendors used/not used
  - quality of materials/equipment (samples, testing, methods of review)
  - schedule (seasonal discount patterns, avoiding rush periods)

delivery system
- e.g. frequency of deliveries
  - accurate record keeping (central storage/delivery)
  - delivery vehicles (size, convenience, cost)
  - efficiency (turnover time)

allocations
- e.g. systematic ordering/delivery
  - request schedule/forms
  - equitable disbursement
  - personnel responsible for coordinating
  - criteria for allocating (need, request, availability, equitable distribution)

effectiveness
- e.g. schooling interruptions based upon depleted supplies
  - percentage of allocation requests rejected/filled
  - time on task to order, fill, deliver supplies
  - number/nature of personnel complaints regarding supplies
  - market price vs price paid for supplies
  - percentage of supplies lost (theft, pilfering, misplacement)

Purchasing, Allocating, Disbursement

Developing, Receiving, Awarding Bids

Key Evaluation Concern: Have efforts to seek competitative prices been adequately pursued, effectively implemented, and legal?

development of bid specifications
- e.g. justification for proposed purchase
  specified criteria (design, quality, safety)
  performance standards assigned
  market availability studied
  consumer evaluation reports studied
  specified restrictions (local, state, federal regulatory agencies)
  comparable alternatives
  review of specifications (by likely users of item or service)

adequacy of bidding process
- e.g. variety of potential suppliers identified
  assessment of potential suppliers (evidence of past performance)
  adequate advertising for item/service
  documented comparison costs
  encouragement of competitive bidding (spirit and letter)
  compliance with Board policy

effectiveness of bidding process
- e.g. purchase price at or below prevailing fair market price
  number of companies bidding
  compliance with regulations pertaining to bid specifications
  compliance with market availability
  cost benefit criteria justify selection of close bids
  supplier meets all conditions of bid
  best item/service obtained for money

Non-Instructional Support

Security Program

Key Evaluation Concerns: How adequately does the district safeguard persons, facilities, and equipment? Does the security program effectively promote a functional educational program?

scope of security program
- e.g. fire protection
  - intrusion alarms
  - crowd control
  - evacuation plans
  - locks and keys control
  - equipment identification
  - library protection
  - storage of funds
  - school security officers
  - traffic control

security procedures
- e.g. records regularly maintained (public access)
  - formal complaint protocol
  - reporting system (reports submitted/audiences)
  - documented guidelines for security activities

personnel involved
- e.g. training/background/experience
  - fulltime/parttime
  - turnover
  - supervision responsibility
  - attitudes and actions (retaliatory vs friendly)
  - relationship with students (retaliatory vs friendly)
  - degree of integration with school staff

adequacy of security program
- e.g. number/location of schools affected by vandalism
  - per pupil average incidence of vandalism
  - cost of replacement or repair to facilities/supplies/equipment damaged or destroyed
  - number/nature of security complaints from personnel
  - personnel hours devoted to security activities
  - frequency outside agencies must intervene (police, firemen)
  - fittingness of security program with security needs
  - safe school environment
  - (see also PUPIL PERSONNEL, Disciplinary Climate)

Non-Instructional Support

Food Services

Key Evaluation Concern: Does the district provide adequate food service to alleviate hunger and meet the nutritional needs of all students?

scope of food service program
- e.g. federal programs (National School Lunch Program, Special Milk Program, School Breakfast Program, etc.)
- services for needy children
- pre-school/aged
- emergency feeding
- banquets/special functions
- nutritional education

adequacy of financial planning
- e.g. commodity allocations
- eligibility/securement of federal reimbursement and matching funds
- inflationary considerations
- projected food costs
- labor costs
- equipment costs

organizational considerations
- e.g. adequate kitchen staffing (worker/student ratio)
- lunchroom supervision (personnel, attitudes, actions)
- lunchroom management (seating, guidelines, enforcement)
- scheduling (adequacy of time for lunch)
- money handling procedures
- budget and accounting (cost/estimate analysis, projections, financial reports)
- purchasing (vendor assessments, product analysis, quantity discounts)
- supplies and inventory (adequate delivery, reordering schedule)

adequacy of food program
- e.g. menu design/students participating
  - requests for seconds
  - analysis of food not eaten
- proper proportions/quantities
- food (flavor, color, texture, temperature, nutritional value)
- method of service (efficient preparation/delivery of hot food)
- profitability of program (cost to student)
- student/faculty appraisals
- requests for banquet service
- community nutritional needs accommodated

Non-Instructional Support

Mail Service

Key Evaluation Concern: Does the mail service provided by the district effectively and efficiently meet district communication needs?

adequacy of mail service

e.g. established routes/reliable schedule
efficiency (average turnover time from posting to delivery)
reliable delivery of U. S. Mail to post office
compliance with postal regulations (documented procedures/ guidelines)
personnel appraisal of mail services
cost of mail service program
analysis of use (high use buildings/programs/ offices, purposes served, times of heavy/light service)
security precautions/lapses
personnel responsible for services/supervision
guidelines/policy regarding what can/cannot be sent through district mail

Non-Instructional Support

Transportation

Key Evaluation Concerns: Is the transportation system adequately staffed and efficiently implemented? Does it safely provide necessary transportation for students who need it?

adequate transportation policies
- e.g. eligibility limits for students (distance, safety, age, handicapped)
- permanently recorded school bus map (posted signs/schedules)
- bus stops (level ground, visible, safe)
- bus scheduling (rationale for time tables)
- accommodation of relevant legislation

personnel involved
- e.g. selection criteria
- driver preparation (amount/type of training)
- driver responsibilities delineated
- supervisory responsibilities delineated
- monitoring (personnel responsible, timing, frequency)
- evaluative criteria

scheduling constraints
- e.g. lay drivers (number/training)
- regular motorists traffic patterns
- railroad crossings (local route hazards)
- distance
- time
- weather
- student behavior
- legislation

student conduct
- e.g. entering/leaving bus
- talking tone to other students/driver
- pushing/remaining seated
- destruction of bus/others' property
- throwing objects within/outside bus
- tampering with emergency door

strategies to control bus safety
- e.g. guidelines/training for driver regarding discipline
- safety patrols (older students on bus)
- bus passes (student access to buses)
- student surveillance (battery operated motion picture cameras)

Non-Instructional Support

Transportation

effectiveness of transportation program

e.g. children transported/not transported (eligibility criteria and operational reports)
degree of compliance with time schedules (schedule analysis)
daily inspection of vehicles (services rendered)
percent of injury/accidents transportation related (annual safety records and accident record analysis)
time in transit for students
public/student response
percentage of equipment typically down
percentage of full-capacity use
cost of transportation program (eligible funding sought, gained)

Non-Instructional Support

School Fire and Disaster Planning

Key Evaluation Concern: Has the school system detailed comprehensive fire and disaster planning contingencies and practiced implementation of the same?

scope of fire and disaster planning activities
- e.g. determination of evacuation patterns and routes
  identification of building shelter areas
  determination of hazardous areas
  evacuation plans practiced
  planning on individual school basis
  disaster planning integrated into total system-wide planning
  school personnel represented on city emergency planning councils

use of school as an emergency community resource
- e.g. disaster shelters
  availability as location for emergency services (medical, shelter, etc.)
  storage of emergency care supplies
  use of staff as emergency aid personnel

effectiveness
- e.g. staff awareness of fire and disaster procedures and responsibilities
  student awareness of fire and disaster procedures and responsibilities
  extent of compliance with fire and safety codes
  extent of central administration planning for:
    - information handling
    - records retention/report generation
    - media relations
    - emergency student and staff reassignment
    - short and long range contingency planning

Non-Instructional Support

Clerical-Secretarial Service

Key Evaluation Concern: Do clerical-secretarial services effectively supplement, support, and extend school administrative capabilities?

clerical specialists
- e.g. secretaries
  - clerks
  - aides
  - technicians
  - bookkeepers
  - accountants
  - administrative assistants
  - office managers
  - paraprofessionals

adequacy of selection process
- e.g. job description determined
  - job classification criteria specified (education, necessary skills)
  - standardized interview
  - valid performance data gathered (skills tests, possibly aptitude test)
  - verification of references
  - defensible match between job description and applicant characteristics

training considerations
- e.g. assessment of past training (performance appraisal)
  - need for further training (performance analysis)
  - training provided (inservice, work shops, recommended coursework)

supervision
- e.g. personnel responsible (background/experience)
  - supervisory training offered
  - assessment procedures (standardized, valid, reliable)
  - time spent on supervisory tasks
  - coordination of supervision efforts (across district/within building)
  - supervisory assessment (how, by whom)

effectiveness of support services
- e.g. turnover of support staff
  - perceived satisfaction of support staff
  - ratings/performance appraisals of supervisors
  - quality of material produced (percentage of typographical errors, inaccuracies)
  - efficiency (time taken to complete a task)
  - attitudes/actions of those interacting with clerical-secretarial personnel

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Pupil Accounting and Census

Pupil Accounting Services

Key Evaluation Concern: Is the pupil accounting process efficiently implemented and does it provide comprehensive and timely information for identified users?

scope of responsibilities
- e.g. maintain student records
  - maintain attendance data
  - follow-up on attendance
  - record enrollment/withdrawals
  - issue work permits
  - report to state
  - report to public

adequacy of attendance records
- e.g. location
  - organization
  - reporting timeline (hourly, daily, weekly)
  - accuracy
  - security provisions (fire/theft/student privacy protection)

master schedule specified
- e.g. collection of attendance data
  - verification process
  - time taken to process
  - interpretation of data
  - turnover/dissemination
    - teachers
    - administrators
    - parents

attendance follow-up activities
- e.g. teacher conferences
  - consultations
  - truancy investigations
  - visiting teachers
  - referrals
    - guidance/counseling
    - psychologist
    - public/private agencies
    - police
  - suspensions

adequacy of facilities and equipment
- e.g. space arrangements
  - student reception area
  - storage available
  - accessible filing system
  - data processing equipment

Pupil Accounting and Census

Pupil Accounting Services

personnel support
- e.g. number
  parttime/fulltime
  training/background
  working students involved

accounting effectiveness
- e.g. average percentage of accounting error
  timely/accurate state reports
  efficiency in distributing forms to students/teachers
  results of attendance follow-up activities
  increasing/decreasing number of absences

Pupil Accounting and Census

Pupil Census

Key Evaluation Concern: Do pupil census services provide effective and useful information for district decision-making?

information gathered/provided
- e.g. total number of students
  - total number of children (birth through mandatory school age)
  - number of women of child-bearing age
  - economic/social trends
  - housing patterns/developments
  - alternative school development profiles
  - population mobility
  - student characteristics
  - target group profile

impact/decision areas
- e.g. boundaries of attendance districts
  - determination of building and classroom use
  - projected personnel needs
  - mobility pattern within/outside district
  - funding appropriations determined
  - prediction of student number/age/grade distributions
  - prediction of educational services/materials/supplies

adequacy of census information
- e.g. adherence to federal/state regulations
  - statistical accuracy of census data
  - timeliness of census reports
  - frequency data is updated
  - integration of data from other agencies
  - evidence of impact on decision making

Health Services

Health Care Services Delivery

Key Evaluation Concern: Are health services well designed, efficiently implemented, and effective in meeting students' health needs?

mission and goals
- e.g. students' rights to health care outlined
  - school's role in health care specified
    - promote health
    - monitor students' health
    - provide diagnostic services
    - provide referral services
  - limitations in school's responsibility established
    - dispensing of prescription drugs
    - providing emergency services
    - caring for special-needs students
  - mandated responsibilities noted

scope of health appraisal services
- e.g. annual health history evaluations
  - systematic evaluations of student development
  - regular screening of problem areas

sophistication of appraisal services
- e.g. use of clinical observation techniques
  - laboratory tests
  - consultation by professional staff

integration of appraisal information
- e.g. systematic use of supplementary health information
  - referrals for further appraisal purposes
  - discussions with family

use of appraisal information
- e.g. individual planning for special-need students
  - teacher consultations
  - health education needs

adequacy of emergency medical treatment
- e.g. number of emergency units per building
  - sophistication of emergency equipment
  - maintenance of emergency equipment
  - persons trained to give emergency treatment
  - strategy designed to transport to hospital
  - history of previous emergency cases (adequacy of past strategies)

Health Services

Health Care Services Delivery

distribution of medication
- e.g. amount/type of medication distributed
  - students seeking medication
    - patterns of chronic users
    - purposes for use
  - efficiency of system for distributing
    - time taken
    - students rejected
    - misuses reported

scope of screening services
- e.g. general health status
  - hearing
  - vision
  - cardiovascular
  - dental

reliability of screening services
- e.g. equipment used
  - trained/certified personnel
  - quality of attention
  - number of valid referrals

impact of screening services
- e.g. number of referrals
  - follow-up activities
  - coordination of prescribed care

scope of immunization program
- e.g. innoculations given
  - immunization schedule
  - proportion of student body served

coordination of immunization program
- e.g. cooperation with county
  - Public Health Service
  - local physicians

adequacy of immunization records
- e.g. records necessary for entering students
  - monitoring process
  - updating
  - evaluating
  - parent input and access

policy/legislation guiding immunization
- e.g. specification for compulsory immunization
  - pre-entrance requirements
  - quarantine provisions
  - relevant state laws and public health codes specified

Health Services

Health Care Services Delivery

adequacy of immunization program
- e.g. epidemics
  school closings
  percentage of absences due to diseases for which innoculations exist

consulting and educational services
- e.g. scope of services provided (consulting, health instruction, inservice)
  use of consulting services (teacher consultations, building/district health care planning)
  health education (input in health curriculum, literature to students, group presentations)
  inservice education (resources to discuss topical issues)

Health Services

Target Group

Key Evaluation Concern: Has the target group been identified and their health needs adequately assessed?

identification process
- e.g. suitability of identification process
  - information gathered mainly for health analyses or scheduling purposes
- personnel responsible
- reliability of process
  - percentage of students not identified
- frequency with which data is gathered/updated
- integration of health data generated by county, community and private agencies

target group profile (health)
- e.g. total enrollment
- percentage of students with special health needs
  - handicapped
  - chronically ill
- percentage of students without full range of innoculations
- past record of school closings for health purposes
- average amount of sick days taken
  - by age
  - by building
  - teachers
  - students
- degree of substance abuse
  - students referred for substance abuse
- number of pregnancies per year
- past record of health referrals
  - to whom referred
  - reason for referral
- (see also Guidance and Counseling, Target Group)

community considerations
- e.g. population characteristics
  - mobility
  - SES
  - ethnicity
  - race
  - education level
  - incidence of disease
- family characteristics
  - single parent
  - working mother
  - chronic illness

Health Services

Target Group

- additional health services available
  - number of hospitals
  - private agencies
  - county/city agencies that provide supplementary health services
- access to additional health services
  - proximity of hospitals
  - availability of county services for students

Health Services

Health Care Program Support

Key Evaluation Concerns: What health care services does the district provide? Do the services meet target group needs?

scope of health care services
- e.g. screening
  - health appraisal
  - health instruction
  - home visitations
  - referrals
  - emergency first aid
  - consultation
  - innoculation program
  - dispensing prescription/nonprescription medication

personnel involved
- e.g. number of personnel
  - per pupil ratio by building
  - by student age level
- qualifications of personnel
  - licensed/certified
  - type of training/education
  - amount of continuing education
  - professional experience
  - personal attributes

facilities available
- e.g. number and location of health care units
- adequacy of units
- accessibility to target group
- examination and first aid area
- isolation area
- reception area

equipment and supplies
- e.g. adequacy of medication and emergency first aid equipment
  - inventory maintained
  - perishable supplies controlled
- accessibility
  - location
  - organization
- security
  - access and security provisions for drugs and drug administration

Health Services

Health Care Program Support

records
- e.g. inclusiveness
  - students with/without records
  - amount of information on typical health record
- usefulness
  - relevance of data
  - continuity in reporting
  - updated
- confidentiality
  - policy for security
  - right to access provisions
  - right to privacy protection

Guidance and Counseling

General Aims

Key Evaluation Concerns: Is the guidance and counseling program philosophy well specified? Do the goals of the program fit into the district program?

mission and goals
- e.g. general aims of counseling program specified
  - guidance philosophy adopted
  - activities implied by philosophy/goals
  - professional literature cited and used
  - degree of commitment to goals (on the part of staff, administration, parents)
  - congruence of counseling philosophy and goals
    - with district mission/goals
    - with nature of student body
    - with community values

Influences

Key Evaluation Concern: What external influences impact the guidance and counseling program?

district support
- e.g. budgeting profile
  - teacher/student use of counseling program
  - availability of support services
    - computer access
    - consultants
    - aides
  - types of tasks assigned (time spent on clerical vs consulting tasks)
  - counseling/guidance staff retention/turnover
  - facilities (condition, accessibility) (see also Facilities)

community character
- e.g. educational level of citizens
  - family structure (single parent families)
  - socioeconomic status
  - social mores
  - ethnic/cultural influences

legislation
- e.g. tasks mandated by legislation
  - nature of task (student-centered vs administrative)

Guidance and Counseling

Historical Analysis

Key Evaluation Concern: Has the guidance and counseling area progressed in the scope, quality, efficiency, and effectiveness of its services to students?

origin of guidance/counseling program
- e.g. date of establishment
  - precipitating factors (such as a board mandate or participation in a government program)
  - means of establishment (such as a district wide planning committee and external advisors)
  - leadership figures

initial status of program
- e.g. placement within the district's organizational structure
  - number and qualifications of staff
  - fulltime-parttime status of staff
  - budget
  - sources of funds
  - policies
  - extent and type of community involvement
  - counselor/pupil ratio
  - services provided
    - career and training information services
    - personal counseling
    - scheduling
    - assistance
    - testing
    - placement
    - follow-up

current status
- e.g. placement within the district's organizational structure
  - number and qualification of staff
  - fulltime-parttime status of staff
  - budget
  - sources of funds
  - policies
  - extent and type of community involvement
  - counselor/pupil ratio
  - services provided
    - career and training information services
    - personal counseling
    - scheduling
    - assistance
    - placement
    - testing
    - follow-up

Guidance and Counseling

Historical Analysis

major trends (positive and negative)
- e.g. definition of services
  - scope of services
  - qualifications of staff
  - organization and administration of services
  - financial base
  - state and federal support
  - policy development
  - community involvement
  - counselor/pupil ratio
  - students' use of services
  - valuing of the services by various groups
    - students
    - teachers
    - parents
    - administrators
    - counselors
    - university recruitors
    - employers

Guidance and Counseling

Target Group

Key Evaluation Concerns: Has the target group been identified? Can the counseling department adequately meet the needs of the target group?

number of students served
- e.g. number of individual students to be served
  groups of students to be served (number/nature of)
  past/present/projected numbers of students to be served

characteristics of students
- e.g. age levels (enrollment/birth pattern)
  percentage male/female
  race/ethnicity
  socioeconomic status
  educational background of parents
  past achievement record
  past educational experiences (program of studies)
  past life experiences (travel, exposure to other values, peoples)
  special educational, emotional/physical needs
  nature of family structure (extended, single parent)
  cross-cultural awareness
  sexual/social mores
  primary language (bilingual)
  aspirations (preprofessional, vocational)

profile of target group
- e.g. percentage of preprofessional/college bound
  percentage of vocational (type of emphasis)
  racial minority/majority
  ethnic minority/majority
  percentage of physically handicapped
  percentage of emotionally/mentally handicapped
  percentage of students classified gifted/talented
  percentage of dropouts (special characteristics)
  percentage of retentions
  percentage of graduates
  trends--comparison of district graduate characteristics
    - to national norms
    - to state norms
    - to previous district graduates
  cohesiveness
    - homogeneity of student body
    - involvement in school activities
    - school spirit

Guidance and Counseling

Target Group

adequacy of counseling services
e.g. counselor/student ratio
estimated time per pupil
estimated time for group counseling
students served/not served
frequency and nature of services used
number of referrals
time spent on chronic problems
perceived satisfaction of counseling program
appropriateness of time allotment in light of
district priorities, students identified needs,
target group profile

Guidance and Counseling

Facilities

Key Evaluation Concern: Are the available facilities adequate for guidance and counseling activities?

location
- e.g. accessible to typical/special student groups
  - accessible to other school personnel (teachers/administrators)
  - physically isolated vs overlapping space
  - provision for discrete entrance/exit
  - accessibility of clerical support
  - accessibility of pertinent records/resources

space arrangement
- e.g. private meeting areas
  - group meeting/testing areas
  - adequacy of space for students waiting for services
  - display and resource area for students
    - for college catalogs
    - career information
    - available jobs
    - scholarships

Materials

Key Evaluation Concern: Are guidance and counseling materials easily accessed, well organized, and secure?

usefulness
- e.g. conveniently located
  - clearly and consistently organized
  - regularly updated
  - relevance of information included
  - comprehensiveness of information included

confidentiality
- e.g. audiences accessing (number and purpose)
  - provisions for security
    - personnel responsible
    - files/rooms secure
    - uses of information monitored
    - student access to files monitored
  - right of access provisions (Buckley Amendment)
    - awareness of rights to access
    - accommodation of right to access

Guidance and Counseling

Budget Allocation

Key Evaluation Concerns: Is the guidance and counseling program adequately funded to carry out its responsibilities? Are allocations in line with district and program priorities?

adequate resources
- e.g. amount of money budgeted to guidance/counseling program
  - percentage of total budget
  - amount of money received from state/federal governments
  - outside funding (special grants)
  - past resources - nature, amount, decreases/increases in percentage allocated
  - stability of current resources
  - prospects for future resources

expenditures
- e.g. percentage of budget allocated
  - for salaries
  - for programs
  - for facilities
  - for materials

congruence of budget allocations
- e.g. with district priorities
  - with counseling philosophy
  - with target group profile and needs

Guidance and Counseling

Pupil Appraisal

Key Evaluation Concern: How comprehensive are pupil appraisal services and are the available services competently staffed and implemented?

appraisal approaches/instruments
- e.g. group/individual
  - diagnostic
  - school achievement
  - special aptitude
  - placement
  - career interests
  - personality
  - skill development

scope of appraisal services
- e.g. assistance in test selection
  - administering tests
  - scoring/analysis/interpretation
  - reporting results to students/parents
  - providing inservice to staff regarding testing issues

students served (see Target Group)

qualifications of counselors in appraisal area
- e.g. degree held (degree and program)
  - experience in testing area
  - special certificates
  - course content
    - measurement
    - statistical analysis

use of appraisal information
- e.g. by administration (scheduling, planning)
  - by teachers (diagnosis, remediation)
  - by students/parents (right to access provisions)
  - by counselors
    - planning individual careers/schedules
    - determining remediation needs
    - diagnosing problems
    - identifying problems

adequacy of appraisal records
- e.g. individual appraisal profiles (typical)
  - appraisal profiles for special need students
  - group test results (nature/number)
  - organization/security of appraisal records
  - relevance and up-to-dateness of profiles
    - for teacher use
    - for counselor use
  - accessibility of appraisal records
  - appraisal information accessed vs appraisal information requested but not available
  - (see also Psychological and Testing Services)

Guidance and Counseling

Class Scheduling

Key Evaluation Concerns: What considerations guide individual and group scheduling? How adequate is the scheduling process?

scope of scheduling considerations
- e.g. state requirements
  master schedule
  graduation requirements
  college requirements
  student interests/aspirations

adequacy of scheduling process
- e.g. number of transfers (schedule changes)
  number of drops
  number of failures
  per pupil time spent scheduling
  long range vs short range scheduling
  reactions/complaints from teachers, students, parents
  regular discrepancy in class size (10 in one class, 35 in another)
  students able/unable to complete chosen program of study
  graduates' reaction to adequacy of program

(see also CURRICULUM AND INSTRUCTION, Scheduling)

Counseling Individual Students

Key Evaluation Concern: How adequately are individual counseling services meeting students' needs?

scope of counseling responsibilities
- e.g. improving classroom behavior
  minimizing test anxiety
  improving study habits
  improving attendance
  improving academic achievement
  resolving student/teacher conflicts
  resolving student/parent conflicts
  discussing personal adjustment
  promoting self esteem
  referrals for health problems/pregnancy

focus of individual counseling
- e.g. time spent in individual counseling
  issues most often discussed
  number of students electing/referred
  number of students referred by counselors

evidence of impact
- e.g. regular attendance
  academic improvement
  decline in disciplinary referrals
  resolution of teacher/student conflicts

Guidance and Counseling

Referrals

Key Evaluation Concerns: How many students are referred by guidance and counseling for special help? Are students adequately identified and are special assistance services well coordinated and regularly assessed?

process to identify special-need students
- e.g. teacher appraisal
  - testing
  - observation/performance appraisal
  - student request
  - parent request

referrals
- e.g. how many students are referred annually
  - for what reasons are they referred
  - to what agencies are they referred

scope of special assistance sources
- e.g. private agencies
  - public agencies
  - school psychologist/psychiatrist
  - community members
  - school staff

coordination of special assistance
- e.g. personnel responsible for identifying special needs
  - ongoing responsibility for monitoring special assistance
  - coordination of assistance (student transported, schedules arranged)
  - follow-up assessment of special assistance

Assisting Staff (Consulting)

Key Evaluation Concern: How effective is the interaction between counselors and other staff in promoting students' welfare?

adequacy of counselors' interaction with teachers
- e.g. frequency/nature of communication between counselors and teachers
  - teacher use of student records/guidance material
  - teacher role in identifying special-need students
  - teacher assistance/responsibility in counseling students
  - inservices/training provided by counselors for teachers (re: appraisal, testing, gifted students, etc.)

counselors' interaction with administration
- e.g. identify student needs
  - propose program objectives
  - help plan and schedule curricular program
  - evaluate adequacy of programs

Guidance and Counseling

Career Development

Key Evaluation Concerns: What role does the guidance and counseling program play in career development? How effective are career development plans implemented and coordinated?

counselors' role in career development
- e.g. annual/biannual course scheduling
  - aptitude testing /interpretation
  - referral to district/building career development program
  - referral to outside agency
  - ongoing discussion with students/parents
  - long-range program of studies planned
  - relevant work experience arranged

materials/programs available
- e.g. resource center available for students (college catalogs, military futures, technical schools)
  - aptitude testing available /interpretation materials
  - parent/student/counselor conferences
  - scope of career information available
  - guest speakers, films, texts
  - orientation of materials (vocational vs college bound)

adequacy of career development activities
- e.g. students' career goals coordinated with program
  - analysis of individual programs of study
  - students' career plans shared across staff
  - student prepared at graduation for career
    - graduate's assessment
    - employer's assessment
    - university transcript

Psychological and Testing Services

Testing Program

Key Evaluation Concerns: What is the the extent of services offered by the district testing program? Are these services implemented by qualified personnel? Is testing information used in a judicious and defensible manner?

funding allocated
- e.g. source/amount of funds budgeted for testing in categorical areas

general testing objectives identified
- e.g. mission well specified
  - role testing is to play
  - purposes for which it may be used/not used

decisions regularly made using test data
- e.g. curriculum revision
  - student placement
  - remediation
  - program budgeting
  - student guidance
  - diagnosis of special need

scope of uses for testing data
- e.g. consultations or inservices to resolve test-identified problems
  - referral (identifying, referring, following-up students who need special assistance)
  - student career planning
  - placement (identifying students for gifted/remedial programs)
  - evaluation/accountability (reporting and interpreting test data as one valid indicator of overall school effectiveness)

personnel involved
- e.g. number
  - placement
  - qualifications (courses taken, degrees held, experience/training in testing)
  - degree of teacher/administrator involvement (test selection, administration, scoring, reporting)
  - training available (inservice training for personnel without testing background)

Psychological and Testing Services

Testing Program

scope of tests regularly available
- e.g. achievements
  aptitude
  attitude
  interests
  vocational inventory

adequacy of master testing schedule
- e.g. tests given regularly
  groups of students tested
  number tested
  time of year tested
  flexibility for ad hoc tests

adequacy of test selection
- e.g. personnel responsible for selecting
  qualifications
  selection criteria used

adequacy of test administration
- e.g. qualified/trained personnel for both groups and individual tests
  appropriate environment

adequacy of test scoring capabilities
- e.g. budget allocation
  turnover time
  hand/machine scored
  error rate

adequacy of test interpretation services
- e.g. qualified personnel
  efficient turnover
  adequate guidelines for users

time on testing task
- e.g. time per pupil/teacher
  breakdown of testing time and students in the testing process

Psychological and Testing Services

Testing Program

target group served
- e.g. number and nature (see Guidance and Counseling, Target Profile)

adequacy of reporting strategy
- e.g. appropriateness of scheduling
  turnover time
  audiences requesting data/receiving data
  information regarding scoring and interpretation

right to access provisions
- e.g. awareness of right to access by staff and students
  accommodation of right to access

adequacy of filing/retrieval system
- e.g. security
  accessibility
  report format
  organization

profile of audiences regularly accessing and using
- e.g. typical uses/users of test data
  ease of access
  schedule of access

adequacy of facilities, equipment, supplies
- e.g. necessary space available (storage, filing, private meeting areas, group testing areas)
  technological sophistication (computer assisted scoring, time for scoring, resulting analysis)
  inventory of ready supplies
  security provisions

Psychological and Testing Services

Psychological Services

Key Evaluation Concerns: Are comprehensive psychological services available to all students? Do procedures allow for due process for students and parents in educational procedures?

psychological services available
- e.g. test selection, administration, interpretation (see Testing Program)
  - diagnostic interviews
  - staff/student/parent consulting
  - student observation/record review
  - intervention
  - referral
  - IEP planning (see Special Education, Individualized Education Program)
  - follow-up

psychologist/pupil ratio
- e.g. district
  - building
  - special need areas

focus of psychological services
- e.g. individualized vs group
  - testing vs consultation

target group serviced
- e.g. characteristics of students served
  - nature of problems
  - duration of service

adequacy of space arrangements
- e.g. private meeting rooms

adequacy of services available
- e.g. fulltime-parttime psychological services
  - students waiting for services
  - students served/not served
  - stability and amount of funding

coordination of multiple services

Discipline and Control

Disciplinary Climate

Key Evaluation Concerns: How might the school's disciplinary climate be described? Is the conduct expected from students specified and behavior monitored in order to promote an acceptable learning environment?

disciplinary climate
- e.g. as might be indicated by percentage of absentees/tardies
  - vandalism profile
  - legal/police interventions
  - racial/ethnic conflicts
  - percentage of students referred daily for disciplinary reasons
  - student conflicts/disturbances
  - district posture on disciplinary rights/responsibilities
  - administrator/teacher enforcement of conduct
  - percentage of disciplinary suspensions
  - number of student/teacher discipline-related injuries
  - conduct in student assemblies
  - conduct in classrooms

focus of disciplinary problems
- e.g. attendance related
  - inappropriate classroom behavior
  - academic behavior (cheating, late assignments)
  - criminal behavior (theft/vandalism)
  - personal conduct (dress, loitering)
  - speech/expression (language)
  - pregnancy/unwed parents
  - suspension/expulsion

adequacy of code of conduct
- e.g. expected conduct documented
  - students'/teachers' rights specified
  - students'/teachers' responsibilities specified
  - discipline policy adopted
  - school regulations specified
  - school rules specified/disseminated
  - student handbook disseminated
  - due process provisions
  - review/revision process
  - procedures for appeal
  - appropriate audiences involved in developing

Discipline and Control

Disciplinary Climate

disciplinary action
- e.g. due process procedures (Goss vs Lopez)
  - notice of disciplinary action
    - nature of accusation
    - rule involved
    - evidence
  - punishment/modification strategy
  - appeal mechanism
  - referral to outside agencies
  - record keeping
  - suspension/expulsion
  - effectiveness of disciplinary actions
    - amount of damage to school facilities

Discipline and Control

Vandalism

Key Evaluation Concern: Are measures taken by the school system effective in limiting and reducing the amount and severity of vandalism?

vandalism defined
- e.g. malicious vandalism (arson, destruction of property)
  non-malicious property damage (graffiti)
  "misnamed" vandalism (non-malicious window breakage
  hidden maintenance damage (litter, shortcut pathways

preventative systems
- e.g. student education in vandalism policy
  school code of conduct
  use of student, staff monitors
  staff in-service/vandalism reporting activities
  security system publicity (to community, students)
  vandalism publicized
  retention of parental assistance
  outside agency assistance (policy, etc.)
  repair and/or replacement of damaged equipment and facilities
  vandal referral and restitution procedures

adequacy of monitoring activities
- e.g. areas monitored
  number and type of staff
  time of monitoring activity

extent of window and door vandalism safeguards
- e.g. size
  placement
  hardware (hinges, glazing, panic hardware)
  locking system
  use of safety or break-resistant glass

extent of wall and roof vandalism safeguards
- e.g. durability of construction material
  repair and replacement cost of construction material
  washability of construction material
  number of hidden niches
  roof accessibility

extent of vaults and file storage vandalism safeguards
- e.g. permanent identification
  reinforced walls, ceilings, floors
  fire resistance
  placement within building
  accessibility safeguards

Discipline and Control

Vandalism

extent of lighting equipment vandalism safeguards
- e.g. placement
  - mounting hardware
  - replacement cost
  - type of light
  - illumination level
  - lighting schedule (time, areas)

extent of grounds vandalism safeguards
- e.g. level of vehicular traffic
  - visibility
  - proximity of roads/parking lots to building
  - provision for snow removal
  - walkway placement (natural pathways, grade, shortest distance)
  - trash containers (placement/number)

scope of intrusion alarm system coverage
- e.g. hallways
  - rooms
  - stairwells
  - doors
  - roof hatches
  - windows
  - alerting/monitoring procedures
  - false alarm prevention measures

vandalism control effectiveness
- e.g. frequency and types of vandalism
  - dollar amount cost
  - resource/programmatic costs
  - staff/student safety
  - school-community relations
  - extent of cooperation of outside agencies

Special Education

Due Process

Key Evaluation Concern: Are parental and student rights insured through procedures implemented within the school system?

analysis of parental and student rights (PL 94-142; PL 93-112 Section 504)
- e.g. to examine records
  - to obtain independent evaluation
  - to appeal any decision by a public education agency
  - to education in the least restrictive environment
  - to free appropriate public education
  - to individualize educational program
  - to impartial due process hearing

adequacy of student evaluation procedures
- e.g. conducted in students' native language or mode of communication
  - psychometrically sound
  - administering personnel qualifications
  - specific to area of educational need
  - validity of procedures given students' impairment
  - multiple measures used
  - diagnosis made by persons familiar with student

effectiveness of due process and evaluation procedures
- e.g. reliability and validity of student's IEP
  - parental awareness of rights
  - number of parental disagreements with IEP
  - compliance with federal and state legislation

Special Education

Individualized Education Program

Key Evaluation Concern: Is Individualized Education Planning (IEP) carried out for every eligible student in a consistent and conscientious manner in compliance with PL 94-142 legislation?

adequacy of program plan content
- e.g. present levels of educational performance
  annual goals
  short-term instructional objectives
  specific services to be provided
  extent of participation in regular educational programs
  initiation and duration dates of services
  appropriate objectives and evaluative criteria

public's involvement in program planning
- e.g. student (where appropriate)
  parents
  student's teacher
  representative of school (other than student's teacher)
  member of student evaluation team

effectiveness of program planning
- e.g. time interval between diagnosis and IEP planning
  steps taken to insure parent(s) participation and informed consent
  number of waivers of parental rights
  provision for monitoring and review of implementation
  (see Special Education, Monitoring and Follow-Up)
  number of parental appeals or revision requests of IEP
  agreement between IEP and system capabilities

Special Education

Program Delivery

Key Evaluation Concern: Are special education programs and facilities available for all eligible students in accordance with their individual educational needs?

scope of student conditions served
- e.g. deafness/hard of hearing
  - mentally retarded
  - multi-handicapped
  - orthopedically handicapped
  - emotionally disturbed
  - specific learning disability
  - speech impaired
  - visually handicapped
  - specific health impaired (hemophilic, sickle cell anemia)

students served (see CURRICULUM AND INSTRUCTION, Target Group)

personnel qualifications (see CURRICULUM AND INSTRUCTION, Personnel)

adequacy of facilities and equipment
- e.g. existence of architectural barriers
  - space allocation for special facilities
  - availability of special equipment

referral services (see Guidance and Counseling, Referrals)

least restrictive environment
- e.g. individually determined placement
  - utilization of area resources/cooperative arrangements
  - extent of handicapped/non-handicapped student mix in regular classrooms
  - special classes available
  - home instruction available
  - hospital and institutional instruction available
  - supplementary services available (resource rooms)

scope of related services available
- e.g. transportation (see BUSINESS AND FINANCE, Non-Instructional Support, Transportation)
  - speech pathology and audiology
  - psychological services (Psychological and Testing Services)
  - physical and occupational services
  - recreational activities
  - counseling and guidance services (see Counseling and Guidance)
  - medical diagnostic/health services (see Health Services)
  - social work/parent counseling (see Welfare/Social Services)

Special Education

Program Delivery

adequacy of program delivery
- e.g. congruence between students' IEPs and programs delivered
  compliance with PL 94-142 and PL 93-112 section 504 legislation
  number of parents invoking due process procedures
  eligible students identified and served

Special Education

Monitoring and Follow-Up

Key Evaluation Concern: Are monitoring and follow-up activities implemented using practical and psychometrically sound procedures?

techniques used
- e.g. personnel involved
  - qualifications of personnel
  - frequency/timing of activities
  - instruments used (federal forms, district generated)
  - data collection techniques used (observation, teacher report)
  - location of evaluation and monitoring activities

records
- e.g. accessibility to staff
  - parental right of access
  - security/confidentiality
  - comprehensiveness of included information

adequacy of monitoring and follow-up activities
- e.g. reliability and validity of methods and instruments
  - extent of parental and student awareness of progress
  - obtrusiveness of monitoring and follow-up activities
  - conducted by person familiar with student
  - timing/frequency of monitoring activities
  - extent of follow-up activities (graduates/students referred or leaving system)
  - quality control procedures (supervision of monitoring/follow-up process)
  - usefulness (information received used to improve quality of service)
  - equitable (all students are monitored and followed)
  - report protocol (who received reports, when, for what purposes)

Welfare/Social Services

Referral and Liaison Activities

Key Evaluation Concern: How adequately does the school safeguard students' welfare by acting as a liaison between the school and social, medical, judicial, and relief agencies?

district responsibility specified
- e.g. school acts in place of parents
  - school acts in best interest of child
  - school provides welfare/social services
  - school refers students to appropriate agencies
  - school identifies, monitors, and evaluates agency/student assistance

student needs identified
- e.g. personnel responsible
  - master schedule available
  - school data base
  - data integrated from outside agencies
  - reliability of data (timeliness/accuracy)
  - needs area identified
    - economic
    - legal
    - social/welfare
    - health
    - psychological

scope of services (direct/referral) available
- e.g. student placement
  - health
  - clothing
  - family assistance
  - consumer services
  - legal services
  - home visitation
  - consultation

audience use of program
- e.g. referral agencies involved
  - parents served/referred
  - students served/referred
  - teachers referring

Welfare/Social Services

Referral and Liaison Activities

referral agencies cooperating
- e.g. educational
  - vocational
  - health
  - psychological
  - social/welfare
  - legal

personnel involved
- e.g. number
  - fulltime/parttime
  - qualifications
  - social work experience

organizational viability
- e.g. access to decision makers
  - location
  - space arrangements
  - funding support
  - visibility
  - access to school/county records

adequacy of services
- e.g. reliable across time/audiences
  - accessible
  - confidential
  - % of students being served/requesting service/needing service
  - alternative sources for services

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A valuable guide to systematic classroom observation. The book illustrates a number of observational systems, focusing on an observation instrument developed at Stanford Research Institute. Additionally, examples of the use of observational systems with diverse educational theories and approaches is provided.

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This report, published by the AASA in collaboration with the City of Boston Public Facilities Department and the Educational Facilities Laboratories is a very complete report published in a form intended to be useful to school administrators and architects. The report highlights prevention measures for four distinctly different types of property damage: (1) malicious vandalism; (2) misnamed vandalism; (3) non-malicious property damage; and (4) hidden maintenance damage.

Plant Considerations

Maintenance and Repair of Plant and Equipment

Key Evaluation Concerns: Are physical plant and equipment repairs completed in a timely and efficient manner? Is the school maintenance staff well organized and adequately equipped?

adequacy of staff size
- e.g. degree of service expected
  - building age and design
  - hours of building operation
  - support services used
  - use of after hours maintenance staff
  - labor saving equipment available

adequacy of maintenance schedules
- e.g. daily, weekly, monthly, yearly schedules available based on standard time allowances or locally determined criteria
  - flexibility of schedules
  - assigned territories and responsibilities
  - provision for field testing and modifying time schedule

adequacy of communication
- e.g. frequency and regularity of staff meetings
  - procedure for work requisitions
  - procedure for contacting on-assignment staff
  - efficiency of contacting on-assignment and in-transit personnel
  - cooperative decision making between instructional and maintenance administrators

adequacy of staff training and development
- e.g. based on identified need areas
  - extent of involvement in planning activities
  - job advancement opportunities provided

adequacy of plant and equipment components
- e.g. extent of standardization of components (plumbing, alarm systems, heating and ventilating, control systems, etc.)
  - availability of labor saving devices
  - maintenance supply inventory
  - repair and replacement part inventory

prioritization of activities
- e.g. responsibility for
  - standardized procedures for determining priorities
  - preventive maintenance
  - scheduled maintenance
  - emergency repair
  - renovation/restoration

Plant Considerations

Maintenance and Repair of Plant and Equipment

scope of preventative/scheduled maintenance
- e.g. lubrication schedule
  painting schedule
  drain cleaning schedule
  cleaning and adjustment of heating units
  elevator service
  drain inspection and cleaning
  emergency systems maintenance

effectiveness
- e.g. timeliness of repairs
  extent of vandalism related to plant and equipment negligence
  number/nature personnel complaints
  compliance with safety/maintenance codes
  cost for repair/replacement due to negligence
  support by labor organizations

(see also STAFF PERSONNEL, Working Conditions, Safety, and Non-economic Benefits)

Plant Considerations

Capital Improvements - Renovation

Key Evaluation Concern: Are physical plant renovations efficiently completed in accordance with district priorities and capabilities?

scope of activities
- e.g. elimination of architectural barriers
  energy conservation measures/compliance
  building and safety code compliance
  plumbing/electrical systems
  heating/ventilation systems
  room design modification
  room equipment/furnishing modification

adequacy
- e.g. budget allocations
  prioritization of activities
  inter-school comparisons
  enrollment projections and student characteristics considered
  extent of maintenance and instructional supervisory personnel involvement in planning

effectiveness
- e.g. compliance with building and safety codes
  compliance with accessibility legislation
  efficiency of building and room use
  energy costs
  maintenance costs
  support from labor organizations
  staff morale
  staff productivity/instructional effectiveness

Property Concern

Sale, Lease, Purchase of Equipment

Key Evaluation Concern: Is the sale, lease, or purchase of equipment effective in meeting the expressed needs of the district? Have efforts to seek competitive prices and services been adequately pursued?

regulations
- e.g. formal bid procedures (see Delivering, Receiving, Awarding Bids)
  - quotations
  - bid guarantees
  - performance bonding

equipment need determination
- e.g. pupil enrollment projections
  - pupil characteristics
  - curriculum content
  - extracurricular activities
  - community/student/staff expressed needs
  - special services
  - repair/replacement of equipment
  - current inventory
  - system financial status

vendor relations
- e.g. openness toward all vendors
  - evidence of full and fair consideration
  - adherence to acceptance limits for promotional gestures
  - confidentiality as requested by vendor

scope of service
- e.g. delivery as promised
  - set-up activities
  - demonstrations/instructional literature
  - access to repair and replacement parts
  - maintenance/operational tips
  - availability of ongoing service

adequacy of service
- e.g. timeliness in repair/replacement
  - comprehensiveness of training in operation of equipment
  - availability of repair/replacement parts
  - location of service office/personnel

quality control (see BUSINESS AND FINANCE, Quality Control)

effectiveness
- e.g. compliance with applicable regulations (see BUSINESS AND FINANCE, Developing, Receiving, Awarding Bids)
  - number of companies bidding
  - equipment compatibility to performance specifications
  - purchase price vs market price
  - efficiency of school service delivery

Property Concern

Sale, Lease, Purchase of Land and Structures

Key Evaluation Concern: How critically is the sale, lease, or purchase of lands and structures studied and is this process conducted openly and with full consideration of possible impact?

long range utilization projection
- e.g. district goals/priorities
  projected student enrollment
  cost of operation
  projected local, state, federal revenues
  necessary building renovations, maintenance

property appraisal
- e.g. rate of growth of property valuation
  rate of growth of industrial/commercial/housing growth
  functional and structural adequacy of building
  site access and surrounding site environment
  site topography and soil conditions
  zoning
  proximity to transportation/utilities/fire protection

building closing/property sale procedures
- e.g. open meetings/hearings
  audiences identified
  media coverage
  school posture (defensive/explanatory)
  parents/students informed
  staff/labor organizations informed

impact
- e.g. community support
  staff support
  congruence with district priorities
  maintenance of financial posture
  millage/funding implications
  educational programs lost and gained
  curricular revisions necessitated
  organizational reorganization (within buildings/district; number of schools; student/teacher ratio)

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This report, published by the AASA in collaboration with the City of Boston Public Facilities Department and the Educational Facilities Laboratories is a very complete report published in a form intended to be useful to school administrators and architects. The report highlights prevention measures for four distinctly different types of property damage: (1) malicious vandalism; (2) misnamed vandalism; (3) non-malicious property damage; and (4) hidden maintenance damage.

District Information

Students

Key Evaluation Concern: How effectively does the district inform the public about students' achievements in order to promote knowledgeable support of school programs?

student activities reported
- e.g. school-sponsored
  community - student projects
  sports/honors/scholarships
  music/drama/art activities
  displays of student work

student achievement
- e.g. achievement indicators reported (test scores/awards and honors/civic affairs)
  target group profiles/by building profiles
  comparison data (within/across district)
  scholarships/national testing honors
  graduates (number/future plans/jobs taken)

community's attitude toward students
- e.g. nature of media coverage (problems/achievements highlighted)
  neighborhood attitude/actions toward students
  percentage of parents/non parents attending school activities (sports, special events)
  support of school programs (millage elections/letters to the editor)
  parochial school enrollment trends
  reactions of persons in businesses/areas where students aggregate
  sale of student sponsored/made goods
  parent appraisal of school's effectiveness (opinnionnaires/parent conferences)

stakeholders informed
- e.g. parents/nonparents
  tax payers
  school/community organizations
  community organizations
  community leaders
  state legislators
  federal programs

scope of dissemination activities
- e.g. means of reporting (by grade level, compared to other districts)
  regular district reports released (nature/number)
  newspaper releases (nature/number)
  school events for the public
  school events open to the public
  school newspapers/bulletins
  student reports/magazines/news programs
  regular/special radio or TV programming
  special assemblies
  parent/citizen open houses

District Information

School Personnel

Key Evaluation Concern: How adequately does the district gather information from school personnel and use it to promote positive school/community relations?

information systematically gathered from school personnel
- e.g. demographics (students/school personnel)
  - student achievement/failure
  - classroom behavior/discipline problems
  - student projects/creative endeavors
  - student aspirations/needs/activities
  - parent reactions (parent conferences)
  - student behavior (buses, cafeteria, school grounds)
  - attendance/tardies
  - health (physical/emotional)

adequacy of information
- e.g. community knowledge about school programs
  - fidelity of staff reports with empirical data (disciplinary referrals, attendance reports)
  - fidelity of community reactions with empirical data
  - parent requests for school information
  - inaccurate community perceptions
  - knowledge/support of school personnel

adequacy of information dissemination
- e.g. timelines (information provided for community decisions)
  - accuracy (district control of released information)
  - frequency of exchanges between school personnel and community
  - reports exchanged through students (nature/number)
  - regular parent/staff meetings (teachers/counselors)
  - regular public access to school personnel (open houses, hearings, open-door policy)
  - school personnel presentations (PTA meetings, community organizations)
  - school events/activities open to community
  - ease of access to administrators/teaching staff/counselors

District Information

School-Community Councils

Key Evaluation Concern: Does the district effectively provide a means for productive interaction between school and community through active councils? How well does the district respond to needs identified by such councils?

community participation profile
- e.g. number/types of persons active in school activities
  community members not participating (characteristics)
  groups regularly asked to participate/not asked
  breakdown of district participation (areas of high/low community involvement)
  number and types of school personnel involved in community councils

council organization
- e.g. policy/roles delineated/documented
  number of councils/members (district wide/building)
  goals specified (alignment with Board priorities)
  access to community at large (open meetings, news letters)

effectiveness of community councils
- e.g. level of council participation
  activities sponsored
  specified goals met
  degree of involvement provided for community at large
  community support (millage elections)
  community perceptions (fidelity/accuracy)

Character of Community

Power Structure

Key Evaluation Concern: How well has the district identified the existing community power structure in order to cultivate a positive and enduring relationship?

political power base
- e.g. political leaders identified
  past/present political issues/advocates
  political structure (county/state/municipal governing bodies)
  professional power structure (formal/informal leaders within professional organizations)
  economic/political make-up of support groups

community leaders
- e.g. analysis of formal/informal leaders
  analysis of support groups backing leaders
  major issues/interests of influential leaders
  trends in changing leadership
  community leaders/groups traditionally supporting school leaders
  (see also Historical Analysis)

Ethnic Groups

Key Evaluation Concern: How adequately have ethnic groups been identified and studied in order to promote a cooperative, productive interaction?

ethnic identification
- e.g. statistical profile of ethnic composition
  ethnic leaders
  location of ethnic components
  idealogies/histories/customs/contributions
  traditional conflicts/misconceptions

ethnic awareness
- e.g. inservice to staff
  ethnic-oriented courses/clubs
  ethnic speakers
  ethnic literature available
  ethnic parent/student orientations
  ethnic data base (trends, test data, needs assessments)
  cross-cultural exchanges
  (see also Historical Analysis)

Character of Community

Level of Support

Key Evaluation Concern: How well has the district identified and characterized its sources of support?

support level

e.g. voting information (levy campaigns)
past/present voting trends
voting profile (characteristics of district advocates)
volunteer programs (number of persons involved)
financial contributions (amount/sources)
parent groups (number/actions/attitudes)
attendance at school activities (nature/number)
district/building level community efforts/councils
political/economic make-up of support groups
changing support patterns (groups/issues)
support profile by issue (groups supporting basic skills, gifted program, busing, etc.)
millage election history
federal/state advocates (legislation/funding)
informal/formal leaders supporting district
ethnic groups/leaders supporting district
professional organizations supporting district
community organizations supporting district
community opinionnaires/needs assessments
media coverage (amount/nature)
school personnel support (attitudes/actions)
student support (attitudes/actions/academic success)

Character of Community

Parent-Teacher Associations

Key Evaluation Concern: How effective are PTA's in promoting parent involvement and furthering school-community interactions?

involvement pattern
- e.g. number (district/building/grade level)
  higher/lower areas of involvement
  past/present involvement profile
  parents involved vs parents not involved (characteristics)
  school personnel involvement pattern
  percentage of parent involvement (district/building/age group/special program areas/minority groups)

activities
- e.g. delineated goals/policies/procedures
  sponsored activities
  meetings (number/attendance/accessibility)
  review/identification of major community issues
  interaction with teaching staff/administration

effectiveness
- e.g. increasing/decreasing parent involvement (numbers/diversity)
  congruence of PTA issues with community issues/Board priorities
  number/attendance per meeting
  specified goals met

Character of Community

Historical Analysis

Key Evaluation Concerns: What community characteristics influence the school system? Is the nature of that influence constraining or supportive?

community-wide efforts
- e.g. degree of involvement in community projects
  - community services offered (number and type)
  - community action groups
  - voting patterns

conflicts
- e.g. public sector vs private sector
  - church vs state
  - urban vs rural
  - parents of school aged vs nonparents
  - renters vs owners
  - political
  - racial

economic characteristics
- e.g. tax base
  - work force characteristics
    - age
    - education
    - male/female percentages
    - income source
  - community income sources
    - industry
    - farming
    - commercial

growth patterns
- e.g. population size
  - socioeconomic character of population
  - racial-ethnic character of population
  - educational character of population
  - areas of population decline
  - areas of population increase
  - mobility
  - birth rate information
  - age distribution
  - zoning patterns

Character of Community

Historical Analysis

leaders
- e.g. analysis of formal/informal power structure
  - political, ethnic, religious affiliations of leaders
  - analysis of support groups for leaders
  - identified issues of leaders
  - changing patterns of leadership

school/community relations
- e.g. community support
  - millage elections
  - newspaper coverage
- community participation in school activities
  - PTA groups
- school posture on public relations
  - amount and type of news releases
- Board of Education
  - nature of membership
  - special interest group influence
  - leadership
  - pattern and degree of school support
- traditional observances
  - ethnic group festivals and observances
  - religious observances
  - special community functions (charity drives, art fairs, bazaars, etc.)

Media

Use of Media

Key Evaluation Concern: Does the district effectively use media to promote sound school/community relations?

scope of media coverage
- e.g. newspapers (daily/weekly)
  radio (number/nature of stations)
  television (programs/school personnel involved)
  school-generated media (newspapers/films)
  unsolicited coverage (editorials/news stories)

appropriateness of selected medium
- e.g. demographic profile of audience (radio/TV/newspaper)
  audiences reached/not reached
  fittingness of releases for audience (parents vs nonparents)
  fittingness of releases for medium (radio coverage of visual display)

adequacy of media coverage
- e.g. school calendar announced
  regular school coverage (amount/nature)
  profile of coverage (buildings, programs, students highlighted)

effectiveness
- e.g. fidelity of messages (audiences understood intended message)
  accuracy (quality control of released information)
  frequency/timing (information received when needed)
  cost/benefits to district
  variety of district events covered
  negative/positive reactions to releases (telephone reactions)
  sound information base within community (opinionnaires)
  attendance at school events

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1. Henniger, Michael L. (Comp.) Parent involvement in education: A bibliography. ERIC Clearinghouse in Elementary and Early Childhood Education, College of Education, University of Illinois, Urbana, Illinois. (Catalog #184)

Comprehensive bibliography on parent involvement. Covers published/unpublished materials from 1970-1978 and is organized into the following sections: Benefits, Goals, Rationale for Involvement, Communicating With Parents, Evaluation of Involvement, Ideas for Involvement, Parents as Decision-Makers, Parents as Teachers, Parent Involvement Programs, Parents' Rights and Responsibilities, and Suggestions to Parents for Involvement.

2. Martin, M. A framework for the identification of information needs in program evaluation. (Doctoral Dissertation, Cornell University, 1978). Dissertation Abstracts International, 1978, 38, 7809470.

Valuable, field-tested outline of program evaluation concerns. The framework identifies a comprehensive list of program components: history, actors, objectives, curriculum, process, evaluation, etc. Each entry also contains an evaluation question. The outline would be an efficient and useful tool to prepare for a needs assessment or evaluation of any program in any school area.

3. Soto, M. L. Teachers, parents, and community as data sources. Handbook of Curriculum Evaluation. Arieh Lewy (ed.) New York: UNESCO, 1977.

This short chapter deals with the importance of examining significant audiences in a learner's environment. The Handbook in which the chapter is found is an excellent resource for persons undertaking evaluation activities related to curriculum.

Pervasive Program Concerns

Content of Policy

Key Evaluation Concern: On what authoritative basis is content based? How effectively can content be used to guide practice?

rationale established
- e.g. need for policy specified
  relationship of policy to district mission/goals
  relevant audiences/situations specified
  limitations specified (at what times, for what audiences, and in what situations is the policy not applicable)

authoratative claim
- e.g. logic
  theory
  usefulness
  state/federal mandates
  endorsement by authoritative body (Board of Education)
  tradition
  trends (use in other systems)

specificity
- e.g. generality of policy statement
  guidelines/procedures provided (by whom, in what fashion)
  interpretations of policy provided (when, by whom)
  detailed derivitive documents supplied (handbooks, guidelines)

adequacy of content
- e.g. clarity (readable/accurate)
  relevance (focused on identified problem/free from obsolete concepts/updated)
  comprehensiveness (anticipates enforcement/compliance concerns/ tradeoffs/unintended side effects)
  appropriate jurisdiction (doesn't overlap with authority of courts, state, federal agencies)
  ethical (attends to the rights of all involved)
  acceptance (involved in adoption process and was accepted by relevant audiences)
  parameters established (when is it applicable/not applicable)
  bases for renegotiation (under what circumstances should content be reconsidered)

Pervasive Program Concerns

Policy Adoption

Key Evaluation Concerns: How efficiently is needed policy adopted? Are adoption procedures fair, efficient, and responsive to district needs?

need for policy established
- e.g. student performance/behavior
  - uneven quality in professional judgment/behavior
  - provide comparable information/services
  - discourage harmful practices
  - discourage unjustifiable divergence

research base
- e.g. needs assessment (empirical/perceptual data)
  - problem identification
  - pre-enactment analyses
  - preparation for implementation
  - impact studies
  - comparative studies

adoption procedures
- e.g. audiences involved (Board/school personnel/community)
  - documented rules of procedures (protocol for adoption, voting procedure)
  - parameters (who is responsible for which policy areas)
  - due process (public involvement)
  - time necessary to adopt (efficiency/timeliness)

adopted policies
- e.g. number adopted per year
  - nature of policies adopted (management issues/student problems/community interaction)
  - congruence of adopted policies with district priorities
  - relevance to stated problems/issues
  - major influences (legislation, critical problems, long-range plans, social reactions)

policy makers
- e.g. number/nature of policy-making groups (district-wide/building program)
  - efficiency (turnover time for adoption process)
  - independence/objectivity (alleged conflict of interest)
  - composition of policy-making groups (diversity of viewpoints, expertise, practical experience)
  - equitable representation (professionals, lay citizens, minority groups)
  - credibility (perceived effectiveness)

Pervasive Program Concerns

Policy Adoption

relevant audiences
- e.g. professionals (teachers/administrators)
  - general public
  - teacher/administrator organizations
  - students
  - community organizations/leaders
  - state legislators

audience participation
- e.g. audiences asked to formally approve policy
  - audiences asked to informally approve policy
  - audiences' views sought
  - audiences' views accommodated
  - audiences represented on policy making board
  - audiences traditionally not represented/accommodated

adequacy of public procedures
- e.g. layman language summaries of policy
  - public hearings
  - exposure drafts
  - written responses sought/accommodated
  - public files maintained
  - open board meetings

Pervasive Program Concerns

Policy Review and Revision

Key Evaluation Concern: How effective is the review and revision process in involving appropriate persons in regular reviews of school policy?

adequacy of review process
- e.g. timing (reviewed in light of decision agenda)
- frequency (number of reviews before/during/after adoption process)
- efficiency (time taken to review)
- thoroughness (review of all policies)
- protocol delineated and justified (who reviews at which stage)
- number/types of reviews solicited (parents, school personnel, other stakeholders)
- specified criteria for reviewers (proximity to school issues, experience, variety of perspectives)

adequacy of revision process
- e.g. documented procedures for revision process
- audiences/personnel regularly involved in revision process
- voting procedure (same/different from adoption process)
- protocol specified (building review/district review/Board review)
- basis for revision (empirical data and research, special interest groups, financing)
- appeals system (ad hoc or formalized)
- due process procedures (all interested parties heard)
- exposure drafts of revised policies (review of revisions)

effectiveness of review and revision process
- e.g. number of appeals/grievances/court cases relating to policy
- number of times policy is thoroughly reviewed
- perceived credibility of review/revision process
- percentage of recommended revision actually made
- percentage of revised policies
- trends in revisions (parenting philosophy, legislation, educational trends)
- personnel/community members involved/not involved
- impact of revised policy (brings improved services)

Pervasive Program Concerns

Implementation

Key Evaluation Concerns: How adequately is policy implemented? Are appropriate audiences informed and involved in implementation, and are the effects of policy monitored?

levels of policy implementation
- e.g. policy
  principles
  rules
  procedures
  guidelines
  suggested procedures

personnel involved
- e.g. policy makers
  converting policy to rules/procedures/guidelines
  educating/disseminating
  monitoring compliance
  enforcing compliance

tradeoffs
- e.g. unintended outcomes/side effects
  uniformity (amount/nature)
  enforcement (resources spent/effectiveness)
  legal susceptibility (litigation)

dissemination
- e.g. audiences (staff, students, parents, community)
  methods (inservice, handbooks, orientation, hearings, media)
  monitoring (quality control responsibility)
  timing (policy provided before/after problem)

compliance
- e.g. enforceability of policy/rules/guidelines
  enforcement of policy/rules/guidelines
  resources (time, money, personnel) spent on enforcement
  number/percentage of compliance problems
  number of complaints/grievances/suits
  audience attitudes toward compliance (reluctant vs voluntary compliance)
  audiences (target groups) not complying

impact
- e.g. number/nature of persons affected by policy
  evidence of improved services (fewer disciplinary problems/ improved faculty involvement)
  uses/misuses of policy/rules/guidelines (district/building/classroom)
  awareness/assimilation of policy
  quality control procedures (encourage compliance)
  disciplinary measure imposed (number/nature)
  outside outcomes/intervention (legal, political, economic)
  public/professional responses (attitudes/actions)

PART III

INDEX

INDEX

Academic Freedom	22
Accounting, Pupil	96-97
Accounting for Resources	
Internal Auditing	64-65
External Auditing	66
Inventory Control	67
Aims, General (Guidance and Counseling)	106
Allocation System for Supplies and Materials	83
Appraisal	
Performance Appraisal	13
Transfer, Promotion, Dismissal	14
Pupil Appraisal	113
Appropriations, Preparation of	71
Articulation (Curriculum)	46
Assisting Staff (Consulting) (Guidance and Counseling)	115
Associations, Parent-Teacher	149
Auditing	
Internal	64-65
External	66
Balance (Curriculum)	47
Bargaining	
Preparation for Bargaining	15
Contract Negotiation	15
Contract Administration	16
Benefits, Non-economic	18
Bids, Developing, Receiving, Awarding	84
Budget Allocation (Guidance and Counseling)	112

Budget Management
- Budget Preparation 68
- Long-Range Budget Projections 69-70
- Preparation of Appropriations 71
- Public Budget Review 72

Budget Preparation 68

BUSINESS AND FINANCE 64-95

Busing (see Transportation) 88-89

Capital Improvements-Renovation 138

Career Development 116

Census, Pupil 98

Change and Innovation (Curriculum) 56-57

Character of Community
- Power Structure 147
- Ethnic Groups 147
- Level of Support 148
- Parent-Teacher Associations 149
- Historical Analysis 150-151

Class Scheduling 114

Clerical-Secretarial Service 91

Compensation
- Leaves of Absence 17
- Working Conditions, Safety, Non-Economic Benefits 18-19
- Salaries, Wages, and Benefits 20

Content of Policy 154

Continuity (Curriculum) 48

Contract Administration 16

Contract Negotiation 15

Councils, School-Community 147

Counseling Individual Students (see Guidance and Counseling) 114

Courses Within Curriculum	44
CURRICULUM AND INSTRUCTION	31-63
Curriculum, Courses Within	44
Curriculum Design	42-43
Custodial Concerns (see Maintenance and Repair of Plant Equipment)	136-137
Delivery, Health Care Services	99-101
Developing, Receiving, and Awarding Bids	84
Development, Staff	58-59
Disaster (Planning for)	90
Disciplinary Climate	121-122
Discipline and Control	121-124
Disciplinary Climate	121-122
Vandalism	123-124
Dismissal (Staff Personnel)	14
District Information	
Students	144
School Personnel	145
School-Community Councils	146
Due Process (Special Education)	125
Employment	23-27
Influences	23
Staffing Needs	24
Recruitment and Screening	25
Personnel Selection	26
Orientation of Personnel	27
Environment (working conditions)	18-19
(curriculum)	41
Equipment, Sale, Lease, Purchase of	139
Equipment, Maintenance and Repair	136
Ethnic Groups	146

External Auditing 66

FACILITIES 136-140

Facilities (Guidance and Counseling) 111

Federal Funds 73-74

Financial Projection of Millage for Levy or Bond Purposes 76

Fire (protective measures) 90

Food Services 86

Funds
- Federal 73-74
- Special State 75
- Investment of Funds 77-78
- Private Source Money 79

General Aims (Guidance and Counseling) 106

Goals (Curriculum) 32

Grievance Procedures 22

Group(s), Target
- PUPIL PERSONNEL 109-110
- CURRICULUM AND INSTRUCTION 35

Guidance and Counseling 106-116
- General Aims 106
- Influences 106
- Historical Analysis 107-108
- Target Group 109-110
- Facilities 111
- Materials 111
- Budget Allocation 112
- Pupil Appraisal 113
- Class Scheduling 114
- Counseling Individual Students 114
- Referrals 115
- Assisting Staff (Consulting) 115
- Career Development 116

Health Care Program Support 104-105

Health Care Services Delivery 100

Health Services 99-105
- Health Care Services Delivery 99-101
- Target Group 102-103
- Health Care Program Support 104-105

Historical Analysis
Guidance and Counseling 107-108
Character of Community 150

Individualized Education Program 126

Influences (on Guidance and Counseling) 106
(on Curriculum) 34

Information, District 144-146

Innovation, Change and (Curriculum) 56-57

Inspections, Safety 81

Instructional Conditions 51-52

Instructional Methods 53-55

Internal Auditing 64-65

Inventory Control 67

Investment of Funds 77-78

Land, Sale, Lease, Purchase of 140

Lease, Sale, Purchase of Equipment 139

Lease, Sale, Purchase of Land and Structures 140

Leaves of Absence 17

Level of Support 148

Long-Range Budget Projections 69-70

Mail Service 87

Maintenance and Repair of Plant and Equipment 136-137

Materials
Guidance and Counseling 111
CURRICULUM AND INSTRUCTION 38-40

Media 152
Use of Media 152

Methods, Instructional 53-55

Millage, Financial Projection of Millage for Levy or Bond Purposes 76

Mission 31
CURRICULUM AND INSTRUCTION (see General Aims and Goals) 31
Guidance and Counseling 106

Monitoring and Follow-Up (Special Education) 129

Non-economic Benefits 18

Non-Instructional Support 85-91
Security Program 85
Food Service 86
Mail Service 87
Transportation 88-89
School Fire and Disaster Planning 90
Clerical-Secretarial Service 91

Objectives (Curriculum) 33

Orientation of Personnel 27

Parent-Teacher Associations 149

Performance Appraisal (staff) 13

Personnel (Curriculum) 36-37

Personnel, Orientation of 27

PERSONNEL, PUPIL 96-135

Personnel, School 145

Personnel Selection 26

PERSONNEL, STAFF 13-30

Pervasive Program Concerns (Curriculum) 31-59
Mission 31
Goals 32
Objectives 33
Influences 34
Target Group(s) 35
Personnel 36-37
Materials 38-40
Environment 41
Curriculum Design 42-43
Courses Within Curriculum 44

Scheduling	45
Articulation	46
Balance	47
Continuity	48
Scope and Sequence	49-50
Instructional Conditions	51-52
Instructional Methods	53-55
Change and Innovation	56-57
Staff Development	58-59
Pervasive Program Concerns (Policy)	154-158
Content of Policy	154
Policy Adoption	155-156
Policy Review and Revision	157
Implementation	158
Plant Considerations	136-138
Maintenance and Repair of Plant and Equipment	136-137
Capital Improvements-Renovation	138
POLICY	154-158
Policy Adoption	155-156
Policy, Content of	154
Policy Implementation	158
Policy Review and Revision	157
Power Structure	146
Preparation of Appropriations	71
Preparation for Bargaining	15
Preparation, Budget	68
Private Source Money	79
Procedures, Grievance	22
Program Delivery (Special Education)	127-128
Projections, Long-Range Budget	69-70
Property Concern	139-140
Sale, Lease, Purchase of Equipment	139
Sale, Lease, Purchase of Land and Structures	140
Psychological Services	120

Psychological and Testing Services
Testing Program 117-119
Psychological Services 120

Public Budget Review 72

Pupil Accounting and Census 96-98
Pupil Accounting Services 96-97
Pupil Census 98

Pupil Accounting Services 96-97

Pupil Appraisal 113

Pupil Census 98

PUPIL PERSONNEL 96-135

Purchasing, Allocating, and Disbursement
Safety Inspections 81
Quality Control 82
Allocation System for Supplies and Materials 83
Developing, Receiving, Awarding Bids 84

Purchase of Equipment, Sale, Lease 139

Purchase of Land and Structures, Sale, Lease 140

Quality Control (Purchasing, Allocating Equipment and Services) 83

Recruitment and Screening 25

Referral and Liaison Activities (Welfare/Social Services) 130-131

Referrals (Guidance and Counseling) 115

RELATIONS, SCHOOL-COMMUNITY 144-153

Renovation - Capital Improvements 138

Repair of Plant and Equipment, Maintenance and 136

Resource Acquisition
- Federal Funds 73-74
- Special State Funds 75
- Financial Projection of Millage for Levy or Bond Purposes 76
- Investment of Funds 77-78
- Private Source Money 79
- School Foundation Programs 80

Resources, Accounting for 64-67

Safety 18-19

Safety Inspections 18, 81

Salaries, Wages, and Benefits 20

Sale, Lease, Purchase of Equipment 139

Sale, Lease, Purchase of Land and Structures 140

Scheduling (Class) 114

Scheduling (Curriculum) 45

School-Community Councils 146

SCHOOL-COMMUNITY RELATIONS 144-153

School Fire and Disaster Planning 90

School Foundation Programs 80

School Personnel 145

Scope and Sequence (Curriculum) 49-50

Security 21-22
- Tenure 21
- Academic Freedom 22
- Grievance Procedures 22

Security Program (Plant and Grounds) 85

Sequence, Scope and (Curriculum) 49-50

Services, Health 99-105

Services (Pupil Accounting) 96-97

Special Education
Due Process 125
Individualized Education Program 126
Program Delivery 127-128
Monitoring and Follow-Up 129

Special State Funds 75

Staff Development 58-59

STAFF PERSONNEL 13-30

Staffing Needs 24

Students (see Target Group(s) and Pupil) 144

Supplies and Materials, Allocation System for 83

Target Group(s)
Health Services 99-105
Pervasive Program Concerns 35
Guidance and Counseling 109-110

Tenure 21

Testing Program 117-119

Transfer, Promotion, Dismissal 14

Transportation 88-89

Vandalism 123-124

Welfare/Social Services 130
Referral and Liaison Activities 130-131

Working Conditions, Safety, and Non-economic Benefits 18